THE GAA CAN’T BE EVERYWHERE, SO WE RELY ON ALUMNI VOLUNTEERS TO KEEP THE CAROLINA SPIRIT ALIVE ALL OVER THE WORLD.
QUICK REFERENCE

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GENERAL ALUMNI ASSOCIATION
COORDINATOR OF ALUMNI CLUBS

JENNIFER CHANDLER ’12
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(919) 843-5115
History of Carolina Clubs

The founding of local UNC alumni clubs began around 1890. From the 1889 alumni meeting in Chapel Hill celebrating the Centennial of the chartering of the University, there went out a call for the formation of branch alumni associations in areas where there were significant numbers of alumni. This meeting resulted in the immediate organization of a small number of clubs. Some of these flourished for a short period and died away to be reorganized at intervals in succeeding years. However, from 1899 to 1922, there was no comprehensive effort made to start and maintain local clubs. The organization of local clubs was put on hold until the opening of the Central Alumni Office in 1922.

From 1922 to 1972, clubs were formed in selected areas where there were large concentrations of alumni, but by 1970 only seven active clubs remained. In the 1970s, with a significant expansion effort, the number of clubs grew from seven to more than 100. The General Alumni Association has remained committed to maintaining the expanded clubs program ever since.

The General Alumni Association currently recognizes nearly 100 active clubs throughout North Carolina and the world. Two-thirds of all Carolina alumni with known addresses live in an area served by a Carolina Club.
What We Do

Each Carolina Club may choose to focus on one, some, or all of the goals listed below.

- Encourage alumni and friends of UNC to continue an interest in the University.
- Connect Tar Heels with one another in your area for social and business relationship building.
- Provide continuing education and enrichment experiences for alumni and friends of the University, showcasing UNC faculty, administrators and athletic programs when possible.
- Provide alumni and friends of UNC with an opportunity to offer ideas back to the University.
- Encourage alumni to become members of the General Alumni Association.
- Provide scholarships and other support to UNC students from the local area.
- Serve your community through sponsoring community service activities that reflect the University’s mission of service.

OUR MISSION IS TO INFORM, ENGAGE AND INVOLVE ALUMNI, PARENTS AND FRIENDS OF THE UNIVERSITY ALL OVER THE WORLD.
A FEW ENTHUSIASTIC ALUMNI WILLING TO SERVE ON A PLANNING COMMITTEE IS ALL IT TAKES TO GET A CAROLINA CLUB STARTED.
What It Takes

You can form a committee by your own personal contacts and responses to a "club interest" email the GAA can send out at your request. This message informs alumni in the area that you have contacted us regarding the organization of a club near you and asks that they contact you if they are interested in participating in an upcoming club event. The responses generated from this mailing are often enough to get things up and running.

Forming your Team

Do you think Dean Smith could have run Four Corners with just one player? Neither do we. We believe the most effective structure for a Carolina Club is a task-specific committee structure, and we encourage two- to three-year-terms to broaden and diversify participation on the committee.

The following is a listing of positions that the General Alumni Association recommends each club fill to ensure a successful club program. It is also important that club leaders be current members of the General Alumni Association. Realizing that some clubs are in areas where there are thousands of alumni and some dozens, your area may demand more or less committee members.

Essential Positions:

- Leader
- Co-Leader or Leader Elect

Some Examples of other Roles:

- Treasurer
- Coordinator of Communications and Social Media
- Coordinator of Student Support
- Coordinator of Programs/Event Chairs
- Coordinator of Community Service

Detailed job descriptions of volunteer positions begin on page 13.
How the General Alumni Association Supports Clubs

Although the General Alumni Association does not provide direct financial support for clubs, the General Alumni Association does provide significant services and support for clubs including:

- **Staff Support** - Staff members at the General Alumni Association assist club leaders with almost all aspects of planning and promoting club events and programs.

- **Club Website** - The General Alumni Association provides a website for each club through Alumni Spaces. These club websites include event information, contact info for leaders, photos and news.

- **Email Broadcasts and Opt-In Lists** - The General Alumni Association will send an email to all alumni on behalf of the club once or twice each month (by request) and provide an opt-in email list for club use at any time.
  - **Broadcast Emails** are sent by the GAA and go to all alumni with a valid email in your club area. Text is due via the broadcast email request form [http://alumni.unc.edu/clubemailrequest](http://alumni.unc.edu/clubemailrequest) about a week before the send date. A full list of broadcast dates can be found here: [http://alumni.unc.edu/broadcastemaildates](http://alumni.unc.edu/broadcastemaildates)
  - **Opt-in List** - The opt-in list is a list of engaged alumni who have taken the initiative to sign up to specifically receive notices from your club. The club leaders can email this list at any point and can continuously update this list with the GAA.

- **Training Workshop for Club Leaders** - This is an annual workshop in Chapel Hill for club leaders and volunteers. Any person involved with a club's leadership or planning group is welcome to attend. Travel expenses are the responsibility of the club or individual.

- **Event Support** - Staff members at the General Alumni Association can build registration forms, including those involving credit card transactions, for any club event upon request. The General Alumni Association can also help identify and make arrangements for speakers from the University to attend a club event.

- **GAA Member Discounts** - The GAA can offer member discounts for many club events. Contact the Coordinator of Alumni Clubs for more information.

- **Mail and Print Services** - The General Alumni Association will provide design, printing and mailing services for large club events, reactivating clubs and scholarship dinners. (These services do not include postage costs, for which clubs are responsible.)

- **Alumni Lists** - The General Alumni Association can provide club leaders with lists of local alumni.

- **Carolina Spirit Items** - The General Alumni Association will provide name tags, pom poms, table toppers, stickers and UNC and GAA information upon request for any club with an upcoming event.

- **Tar Heel Merchandise** - The General Alumni Association provides UNC items and/or event support to Old Well and Bell Tower Clubs as a reward for their outstanding performance. Tar Heel Clubs can work with the GAA to purchase UNC items and GAA merchandise at a discounted price.

- **Ideas, Advice, Love and Attention** - We are here for you! We can't be everywhere, so we rely on our awesome volunteers to keep their local Tar Heels connected to Carolina. Use us! If you want to talk out an idea, get advice on events or promotions, chat Carolina Basketball, give us a call. That's our job. And it's the best job in the world.
“I CAN LOOK BACK AT THIS AND KNOW THAT I HAD A HAND IN MAKING THIS HAPPEN, GIVING FELLOW HEELS A HOME AWAY HOME, OUR NORTHERN PART OF BLUE HEAVEN.”

AIME GOLDBERG MACDONALD ’98
BOSTON CAROLINA CLUB
How Carolina Clubs Serve Alumni and Our University

Carolina Clubs can be found across the U.S. and around the world, with a mission to inform, engage and involve alumni, parents and friends in the life of the University, regardless of location. The Carolina Clubs program is sponsored by the General Alumni Association, with membership open to anyone seeking closer ties to the University.

Carolina Club volunteers serve alumni by:

- Providing opportunities for alumni to socialize and network through social and service events and activities in their own communities.
- Helping alumni stay connected to their alma mater by keeping alumni informed about major events at our University or simply by providing the opportunity for alumni to share their memories of their years at Carolina.
- Providing enrichment or educational programs that provide life-long learning opportunities for alumni.

Carolina Club volunteers serve our University by:

- Helping alumni stay involved with their alma mater.
- Providing feedback to our University through the General Alumni Association.
- Serving as ambassadors of the University to their local communities.
- Helping enhance students’ experiences with Carolina by hosting local send-off receptions. Clubs also occasionally provide funds for student scholarships.
- Helping represent our University to members of the North Carolina General Assembly.

Carolina Club volunteers serve the General Alumni Association by:

- Encouraging membership in the General Alumni Association. The General Alumni Association exists to serve our membership and support our University. Therefore, clubs serve alumni and our University by encouraging membership in the General Alumni Association.
Carolina Clubs Recognition Criteria

The following are the basic criteria that each club must meet in order to be recognized by the General Alumni Association. These criteria ensure that each club serves the best interests of its local alumni, our University, and the UNC General Alumni Association.

To be recognized as an official Carolina Club and to receive all service provided therein, a club shall:

- Demonstrate that it is formed to promote the interests of The University of North Carolina and its alumni by maintaining a mutually beneficial relationship.
- Conduct itself in a manner consistent with the goals and objectives of the General Alumni Association and the high standards of the University.
- Inform the General Alumni Association of all club-sponsored events and submit an attendance count through Alumni Spaces after each event.
- Extend membership to include any alumnus or friend of the University and hold all events in facilities where all alumni and friends are welcome on an equal basis.
- Submit an Annual Report (provided by the GAA) on or before the date prescribed by the Coordinator of Alumni Clubs.
- Elect or select a Club Chair or Leader to serve as the main representative of the club to the General Alumni Association.
- Ensure that all club leaders are members of the General Alumni Association.
- Remain in good financial standing with the General Alumni Association and with any person or organization with which the club does business.

NOTE: Final determination as to the eligibility of a club for recognition rests with the Board of Directors of the General Alumni Association.
Carolina Clubs Activity Designations

Carolina Clubs are grouped into one of three Activity Designations based on the number and type of volunteer-led events they host. The level of support provided by the GAA correlates to the activity designations of each club.

**TAR HEEL CLUB**
- These are clubs that have only one or two types of events each year.
- At least one GAA member volunteer liaison to the GAA
- No annual report required unless there is a bank account
- Agree to and abide Carolina Club Leaders Code of Conduct

**BELL TOWER CLUB**
- These clubs must have at least two events beyond game-viewing parties.
- Complete annual report
- Host at least one community service project
- Have a leadership committee
  - Six people if you have more than 6,000 alumni
  - Four people if you have 2,000 to 5,999 alumni
  - Two people if you have fewer than 2,000 alumni
- Have at least one volunteer trained on Alumni Spaces
- Have a chair-elect or clearly stated succession plan
  - Chair cannot be there for more than three years
- Agree to and abide Carolina Club Leaders Code of Conduct

**OLD WELL CLUB**
Old Well Carolina Clubs are the gold standard of alumni clubs. They have a strong leadership team providing a number of events that appeal to a diverse audience of alumni.
- These clubs must have at least three events beyond game-viewing parties.
- Complete annual report
- Host at least two community service projects throughout the year
- Host at least one networking, career or professional development-focused program per year
- Support current or prospective students with a send-off party, scholarship, etc.
- Be actively engaged in social media
- Have a leadership committee
  - Six people if you have more than 6,000 alumni
  - Four people if you have 2,000 to 5,999 alumni
  - Two people if you have fewer than 2,000 alumni
- Have at least one volunteer trained on Alumni Spaces
- Have a chair-elect or clearly stated succession plan
  - Chair cannot be there for more than three years
- Agree to and abide Carolina Club Leaders Code of Conduct
Example Volunteer Position Descriptions

**CLUB LEADER/ CO-LEADER**

Length of Commitment: At least one year but no more than three years (Ideally, Chair will serve as Past Chair for an additional year)

Time Involvement: 10-15 hours per month

**Duties/Responsibilities:**

- Be a current member of the General Alumni Association
- Maintains contact with the General Alumni Association
- Represents the University and the General Alumni Association in the local area
- Serves as the main contact for interested alumni in the local area
- Schedules and presides at all meetings of the Club Leadership Committee
- Appoints committee chairs and assists with committee member selection
- Ensures that all committees stay on target with their specific tasks
- Identifies potential successors
- Attends the Club Leaders Training Workshop (optional, but highly recommended)
- Abides by GAA Club Leader’s Code of Conduct (see last page)

*A leader’s first and most important job is to name your successor. If you win the lottery and move to Fiji, who will lead the club?*
LEADER - ELECT

Length of Commitment: One Year
(Chair-Elect will move into the Chair position)

Time Involvement: 5-10 hours per month

Duties/Responsibilities:

- Be a current member of the General Alumni Association
- Shadows Chair to learn all aspects of the leadership position
- Takes on one or two primary responsibilities of interest (e.g. event chair, communications coordinator, etc.)
- Identifies potential successors
- Attends the Club Leaders Training Workshop (optional, but highly recommended)
- Abides by GAA Club Leader’s Code of Conduct (see last page)
TREASURER

Length of Commitment: At least one year but no more than three years

Time Involvement: 3-5 hours per month

Duties/Responsibilities:

- Be a current member of the General Alumni Association
- Maintains club bank account for club financial transactions
  - For GAA deposit accounts through Bank of America, communicates with GAA Business Office regularly regarding account
  - For checking accounts, makes sure there are two current signatures (one of which belongs to a GAA staff member) on file for checking account
- Accepts all payments and makes all disbursements for club business
- Keeps accurate records of all financial transactions
- Prepares financial reports for Club Leadership Committee meetings and for the annual report
- Identifies potential successors
- Attends the Club Leaders Training Workshop (optional, but highly recommended)
COORDINATOR OF COMMUNICATIONS AND SOCIAL MEDIA

Length of Commitment: One – Two Years

Time Involvement: 3-5 hours per month

Duties/Responsibilities:

- Coordinates with GAA to provide information for broadcast emails and other communications
- Sends event invitations and club news via GAA-provided email opt-in list
- Regularly updates club’s Alumni Spaces webpage with news and event information
- Actively maintains club-specific social media accounts and ensures that GAA staff have co-administrator status
- Provides information to the General Alumni Association for printed notices in an appropriate and timely fashion
- Collects and sends information/photographs to the GAA for the Carolina Alumni Review and GAA social media accounts
- Identifies potential successors
- Attends the Club Leaders Training Workshop (optional, but highly recommended)
COORDINATOR OF STUDENT SUPPORT

Length of Commitment: One – Two Years

Time Involvement: 3-5 hours per month*
*Time involvement may increase surrounding events

Duties/Responsibilities:

- Identifies possible scholarship fundraising opportunities
- Coordinates the planning of a summer send-off party for all students who have enrolled at UNC to provide them with an opportunity to talk with and meet area alumni and other area UNC students
- Coordinates special projects for area students (good luck on exams note cards, holiday parties with the Club, etc.)
- Identifies potential successors
- Attends the Club Leaders Training Workshop (optional, but highly recommended)
COORDINATOR OF PROGRAMS/ EVENT CHAIR

Length of Commitment: One – Two Years (or event specific)

Time Involvement: 3-5 hours per month*
* Time involvement may increase surrounding events

Duties/Responsibilities:

- Coordinates the planning and implementation of an event

- Works with the Club Chair and treasurer to establish pricing for the event designed to cover all expenses incurred (keep in mind the cost of mailing the invitation, etc.)

- Establishes and maintains relationships with local venues and vendors

- Works with the GAA staff (and Club’s Coordinator of Communications, if applicable) to ensure invitations are sent to alumni in an appropriate and timely fashion

- Works with the Club’s Coordinator of Communications to create and distribute event information and promotional materials

- Identifies potential successors

- Attends the Club Leaders Training Workshop (optional, but highly recommended)
COORDINATOR OF COMMUNITY SERVICE

Length of Commitment: One – Two Years

Time Involvement: 3-5 hours per month

Duties/Responsibilities:

- Coordinates a Tar Heel Service Day project, which will take place in October, in honor of University Day
- Establishes and maintains relationships with local nonprofits and organizations
- Actively seeks volunteer opportunities for alumni in club area
- Works with the Club’s Coordinator of Communications to create and distribute service project information and promotional materials
- Identifies potential successors
- Attends the Club Leaders Training Workshop (optional, but highly recommended)
Club Financial Responsibilities

The services and support provided by the GAA to clubs at no cost – combined with careful planning to appropriately charge event fees to attendees as needed – should allow most clubs to operate without the need for additional fundraising.

Clubs should operate on a break even basis.

Clubs are expected to notify the GAA as soon as possible if a situation occurs which might put a club into debt.

Clubs will need to charge appropriate attendance fees to cover all event-related expenses. All club events should operate as close to a break-even basis as possible, unless the event is intended to raise funds for the club scholarship fund. If you need help estimating the cost of an event, please contact the Coordinator of Alumni Clubs for help. Event costs should be estimated as accurately as possible taking into consideration:

- Cost of reserving the facility
- Food and beverage costs
- Bar charges (cash bar or bar service is required—see Alcohol Policy in the Event Hosts and Liabilities section)
- Taxes/gratuity
- Costs associated with a guest speaker including travel, lodging, event admissions, etc.
- Any additional margin you wish to build in to cover other future expenses or to help fund a local scholarship account.

The General Alumni Association provides an online registration system that can collect funds for ticket sales and RSVPs. Contact the Coordinator of Alumni Clubs to set up an event registration page.

The General Alumni Association strongly discourages clubs from soliciting general financial contributions from alumni for anything other than a local scholarship fund. If you believe your club is in need of additional operating funds, please talk with the GAA first to determine the best approach to meet your needs. The GAA may be able to cover upfront costs to be reimbursed by attendance fees. Clubs should not be charging dues.

Clubs are expected to also cover all postage costs for printed event notices or newsletters. (Newly reactivated clubs may receive postage for one mailing by request within the club’s first year)

Email and social media are the primary method of informing alumni of upcoming club events. However, a combination of printed invitations and online communications are ideal. If your club wishes to send a printed mailing, the GAA will cover all design and production costs. However, your club will be responsible for postage.
Club Bank Accounts

All GAA clubs have access to a deposit bank account with Bank of America. This offers participating clubs (1) banking services with no fees; and (2) detailed reports provided by the GAA business office tailored to provide itemized information for your club.

With these accounts, a club is given a deposit-only bank account through Bank of America which eliminates the need for a separate signature card for each account and all fees are waived for the club. A purchase card is assigned to the President and/or Treasurer of the club with a limit of $500 - $1,000 but not to exceed the balance in their account. The purchase card is only for expenses and is not tied to their bank account. If a purchase card cannot be used for an expense, the club sends the Coordinator of Alumni Clubs an invoice or receipts for a check to be cut by the Alumni Association.

The Business Office creates revenue & expense accounts within their accounting software for each club to help with reconciliation. All bank statements are mailed to the Business Office of the General Alumni Association. Any internal deposits for clubs, including all iModules form transactions, are reconciled within 7 days of the month ending. The deposits are posted to the clubs respective revenue account. Each club is given deposit slips for their deposit-only bank accounts to make cash or check deposits at any of their local Bank of America branches.

Purchase cards are issued via Bank of America to the President and/or Treasurer. Purchase cards are used like credit cards, but the GAA Business Office is able to control via the Bank of America website in regards to initiating or cancelling a card as well as increasing or decreasing limits. If a club wishes to have their limit increased temporarily, a request must be emailed to the Club Coordinator to approve. Once the Business Office receives the approved request, the increase can be made instantaneously. Purchase card statements for the Clubs are sent to the Business Office who emails the statement to the respective club for approval to be paid out of the respective club bank account.

After bank statements are received by the Business Office, the Business Office emails bank reconciliations within 2 weeks of the end of the month to the President and/or Treasurer of the respective clubs. If there is no activity for the month, no reconciliation is emailed.

Contact the Coordinator of Alumni Clubs if your club wishes to open a new account.
**Student Scholarships**

Many clubs enjoy raising funds for a local student scholarship as part of their ongoing activities. The General Alumni Association heartily endorses this activity because it demonstrates to the local community the commitment that alumni have to the community and to the education of its young adults. This activity also can serve to give a club a sense of “higher purpose” by incorporating such a meaningful endeavor in its more socially oriented activities. Some of our clubs report their most satisfying programs included the presentation of the scholarship to a local student.

**Who do we contact if our club would like to begin raising funds for a scholarship?**
Contact your Coordinator of Alumni Clubs at the General Alumni Association. The General Alumni Association will contact and relay information to UNC’s Office of Scholarships and Student Aid.

**What is the minimum amount needed to fund a scholarship?**
$500 (As you are probably aware, the cost of higher education is increasing steadily, especially for out-of-state students. An award of more than $500 would certainly be welcome. The higher the scholarship can be, the more chance it will have of significantly assisting a student financially or perhaps even making a difference of whether or not a student can attend UNC).

**Do we need to try and raise enough money to endow a scholarship?**
No. Your club can simply raise funds each year and provide funds for a scholarship as you are able.

**When do we need to commit to providing a scholarship?**
You will need to let the General Alumni Association know that your club is committed to providing funds for a scholarship in the January before the school year in which your scholarship will be awarded.

**How will the scholarship recipient be chosen?**
The Office of Scholarships and Student Aid will choose a student from within your club’s local area based on financial need.

**When will we know who the recipient is of our club’s scholarship?**
Because club scholarships are based on financial need, the recipient’s name remains private until they contact the club directly. The Office of Scholarship and Student Aid will send a letter to the student chosen for your club’s scholarship. In this letter, the student will be asked to contact your club’s chair or president to acknowledge that they will receive the scholarship. Generally, the recipients of club scholarships are not chosen until late summer.

**When do we need to send the money for the scholarship?**
Your club will need to let the GAA know your plans regarding donation amount and the number of students you’d like to support through the Scholarship Commitment Form which is distributed to club leaders in the spring. Once your scholarship commitment is received, we will contact you regarding when funds must be received, which is usually in mid-summer. The General Alumni Association will forward the money to the Office of Scholarships and Student Aid which will distribute the money to the student(s).

**What are some ways that we can begin raising the money for a scholarship?**
1) Hold revenue-generating events where the proceeds go to fund the scholarship.
2) Over-charge by a small amount for all club events with this amount set aside to fund the scholarship.
3) Hold raffles at Club events for Carolina merchandise and put the proceeds toward the scholarship.
4) Participate in other “traditional” fundraising activities such as selling community coupon books, wrapping paper, etc.
Contact with Prospective and Current Students

Alumni and Admissions

The General Alumni Association understands that alumni have a vested interest in attracting talented young people to Chapel Hill. The General Alumni Association has a staff member who acts as liaison between the Office of Undergraduate Admissions and alumni. Any requests that you have for admissions information, college fair representation, admissions timelines, etc. should be directed to:

Kylie Apple, Coordinator of Student Enrichment and Alumni Engagement  
919-843-0790 or kylie_apple@unc.edu

Send-off Receptions

These events are a great way for new students to meet their fellow classmates and alumni while socializing and learning more about Carolina. Send-off receptions can range from ice cream socials to pizza parties to dinners.

A host interest form will be sent to club leaders in the early spring. If clubs would like to host a send-off, they must respond to this form and/or contact the Coordinator of Alumni Clubs.

Over the past few years, the GAA has partnered with UNC New Student and Family Programs to host send-off receptions in certain areas. If there is a parent in your area interested in co-hosting with your Club, you will be contacted.
Alumni Lists

Can I get a list of alumni in my area?
The General Alumni Association will provide lists of local alumni to club leaders to assist with the recruitment for club leadership and the promotion of club events.

The policy established by the General Alumni Association states that the information provided to club leaders can only be used for University and General Alumni Association purposes and for individual communication of a personal nature between members listed therein. Use of the information for any commercial, political or solicitation purpose is expressly prohibited. Reproducing and storing the information in a retrieval system by any means, electronic or mechanical is prohibited. Photocopying or use of the addresses or other information provided for any mailing other than notification of an official alumni club function is strictly prohibited.

How do I make a request for a local alumni list?
Simply contact the Coordinator of Alumni Clubs at the General Alumni Association to make your request.

What if alumni in my area ask me to share the list of alumni with them?
As a club leader, you may occasionally receive requests from local alumni for an alumni list. However, as stated in the policy above, you should not share the alumni information you have been given for club purposes. Your response should be to ask the alumnus requesting the information to contact the General Alumni Association Records Department at 919-962-3735.

Members of the GAA can log on to http://alumni.unc.edu and click on the Online Directory button to search for other alumni by name, class year, geographic region, and career code.

Help the General Alumni Association Keep in Touch with Alumni

The General Alumni Association Records Department makes an average of 150 address changes each day! Yet we still have “lost” alumni with incorrect addresses.

Your club can help by always encouraging alumni to keep their addresses updated with the General Alumni Association and by passing along any address changes of which you become aware.

To make an address change at the General Alumni Association:

Phone: 919-962-3735
Fax: 919-962-0010
E-mail: alumni@unc.edu


Event Host Liabilities and Insurance

The General Alumni Association maintains a comprehensive commercial package/general liability insurance program. This coverage extends to local clubs and local clubs’ leaders when certain conditions are met by the local clubs.

The GAA policy provides liability coverage for local club leaders who are members of the GAA in the performance of their duties on behalf of the GAA, provided the club leaders are acting in accordance with stated GAA policies. This coverage also applies to a spouse of club leaders who are GAA members.

Thus, it is important for club leaders to maintain their GAA membership.

It is also important to note that club leaders’ actions and activities must be in compliance with GAA policies. In particular, club events must comply with the GAA’s Alumni Programs and Alcoholic Beverages policy (see next page). The GAA liability insurance policy will not provide coverage to club leaders or for events at which alcoholic beverages are served in a manner in conflict with this policy.

The GAA’s policy does not replace the need for any individual club leaders’ personal liability insurance. Club leaders are encouraged to consult with their personal insurance provider.
Memo

To: Jennifer Chandler
From: Steve Shaw
Date: 9/28/2017
Re: Insurance coverage for Club activities and Club leaders

This memo contains important information about the General Alumni Association’s insurance program and important implications to the leadership and activities of local Clubs.

The Alumni Association maintains a comprehensive commercial package/general liability insurance program. Our policy specifically:

- Notes the coverage is for a non-profit educational association;
- Includes “clubs-civic, service or social”;
- Extends coverage to include “members” while acting on behalf of the Alumni Association in accordance with our policies and standards.

This assurance should satisfy our club leaders and any vendors or facilities our local clubs may use that our policy covers Alumni Association members while performing local club activities on our behalf. I strongly encourage all club leaders and participants involved in club events to maintain their membership in the Alumni Association to enjoy the coverage that our policy extends to members. This coverage also applies to a spouse of club leaders who are GAA members.

It is important to note that club leaders’ actions and activities must be in compliance with our policies. In particular, I would draw your attention and the Club’s attention to the “Alumni Programs and Alcoholic Beverages” policy approved by the Association’s Board of Directors (see attachment). Our liability insurance policy will not provide coverage to club leaders or for events at which alcoholic beverages are served in a manner in conflict with this policy.

The Association’s policy is not intended to replace any individual leaders’ personal liability insurance coverage. All Club leaders should be encouraged to consult with their own insurance agent regarding their personal insurance needs.

The Association’s local agent is Duke Thompson of Summers Thompson Lowry, LLC here in Chapel Hill. He may be reached at (919) 968-4472 to verify this information. Of course, any club leader may call me at (919) 962-3599 should they have any questions or concerns.

Please feel free to share this memo with any club leader to verify our insurance coverage. I will also be happy to share a copy of the declaration page of our current policy with any club leader, upon request, if this would be helpful. Copies also are available for use by the vendors or facilities with which the local club does business.

Please let me know if you or any of our Club leaders have any questions.
Alumni Programs and Alcoholic Beverages

The General Alumni Association recognizes that alcoholic beverages may be served at alumni programs and events from time to time. The Association’s Board of Directors has adopted the following policy with regard to the service of alcoholic beverages at officially sanctioned Association events:

**Alcoholic beverages may only be served:***

- in a manner that is consistent with all local, state and federal laws and regulations
- by a hired, qualified third party alcohol server
- as part of an event that includes food service and non-alcoholic beverage service

**Alcoholic beverages may not be served:***

- in a manner that promotes the service of the alcoholic beverages as “free” or “without cost”
- “self-service” style or by any other uncontrolled means
- at programs designed to attract current or prospective students who may be under 21 years old
- by any volunteer or staff person representing the Association

*At any Association event, the distribution of free alcoholic beverages, of alcoholic beverages to minors or of alcoholic beverages to anyone who is intoxicated is prohibited.*

This policy was adopted by the Board of Directors of the General Alumni Association of the University of North Carolina on April 4, 1998.

Attest:

Edward H. “Ned” Hardison
Chair, Board of Directors
General Alumni Association History and
The George Watts Hill Alumni Center

The University of North Carolina is the oldest public university in the United States. The UNC General Alumni Association is one of the oldest organizations formed to link former students to their University.

Convened by Governor Morehead in 1843, 31 graduates gathered in Chapel Hill at Commencement and began plans for an alumni organization. Their goals still apply today:

- Perpetuate the friendships formed in collegiate years,
- Promote the welfare of our alma mater, and
- Promote the cause of education.

In the early 1900s, a permanent Alumni Office in Chapel Hill and the Alumni Review magazine were established. Dan Grant ’21 served as the first full-time Alumni Secretary. Spike Saunders ’25 ran both the Alumni Office and the Review for 43 years. Clarence Whitefield ‘44 succeeded Spike and led the General Alumni Association from 1970 - 1982. Doug Dibbert ’70 came back to Chapel Hill to lead the General Alumni Association in 1982 and continues as its president today.

In 1993, the General Alumni Association moved into offices in the new George Watts Hill Alumni Center. The Alumni Center was made possible by a $3.5 million challenge gift from George Watts Hill ’22 and donations from more than 14,000 Carolina alumni, faculty, staff and friends. The Center’s opening came just in time to celebrate the General Alumni Association’s 150th anniversary and the University’s bicentennial celebration in 1993-94.

Alumni should think of the beautiful George Watts Hill Alumni Center as their home in Chapel Hill. The Alumni Center has meeting rooms, a library, and memorabilia for alumni to enjoy. The Alumni Center also houses The Carolina Club, an alumni-faculty-staff membership dining club, which all General Alumni Association members are welcome to join.

WHAT THE GENERAL ALUMNI ASSOCIATION IS AND IS NOT

The General Alumni Association is a non-profit organization founded to support the University, foster alumni fellowship, and provide information and activities. The General Alumni Association is supported by membership contributions and does not solicit gifts for the University or for General Alumni Association operations. While advising University officials and encouraging all activities which promote the University, the General Alumni Association is not affiliated with University Development, The Rams Club (The Educational Foundation), or any other University program or foundation.
Membership in the General Alumni Association

Individual membership in the GAA is very important to the University, the GAA, and local alumni.

All GAA members receive the Carolina Alumni Review every other month. The Review contains important news and information about the University, Association programs and events, and issues and features affecting the University community, including local alumni. Membership in the Alumni Association is an important measure to the University regarding alumni participation and support.

The GAA is a member-supported, self-supporting organization. Members’ dues contribute the largest portion of resources to the GAA year after year. Members’ dues allow the Association to fund support for local clubs, including printing, training and development, resources and staff support. Members’ dues also provide support for all the many other important GAA programs including student programs, athletic events, reunions, career services, young alumni programming, online services and the Carolina Alumni Review.

In addition to the news about Club events and activities in the Review, GAA members receive substantial discounts on GAA programs and events, and enjoy many other Member Rewards. Only GAA members have access to the GAA Online Alumni Directory and other programs, including the Alumni Admissions Forum, Family Camp, Career Coaching sessions and webinars, etc.

Please encourage alumni in your area to consider GAA membership to support the University and the GAA, and reap the rewards of GAA membership. Carolina Clubs can provide assistance in our membership development through these efforts:

- At club events, have membership applications prominently displayed and arrange in advance for someone from your area to make remarks during the program to encourage those who are not GAA members to join. Membership application forms will be provided by the GAA at your request. Copies of the Carolina Alumni Review or other GAA program brochures can also be supplied.

- Provide space for a GAA membership appeal in your Club communications, whenever possible.

- Work with the GAA to provide GAA member discounts when applicable.

- If a club event has limited capacity, consider offering attendance first to GAA members.
Carolina Clubs seek to inform alumni and friends about the happenings of The University, connect alumni and friends back to Chapel Hill through events and programs, and engage alumni and friends in the life of the University by providing opportunities to volunteer and give back to The University and local communities.

As a volunteer representative of my General Alumni Association and The University of North Carolina I pledge to:

- Maintain current membership in the GAA
- Abide by all GAA policies and procedures as detailed in Club Leaders Handbook
- Be welcoming to all alumni and friends with an interest in my Carolina Club, GAA or The University
- Engage new volunteers on a regular basis
- Present a positive image of an alumnus of The University
- Encourage alumni and friends to become members of the GAA
- Promote the best interest of The University and GAA

By signing below, I understand that failure to abide by the Carolina Club Leaders Code of Conduct may result in termination as a Carolina Club leader.

Name (Print) ___________________________ Signature ___________________________

Name of Club ___________________________ Date ___________________________

Keep a copy of this handy to reference as needed.

Carolina Clubs Purpose

- To encourage alumni and friends of UNC to continue an interest in the University.
- To provide opportunities for social and business networking among alumni and friends of the University.
- To provide continuing education/enrichment experiences for alumni and friends of the University, including showcasing our faculty, administrators and athletic programs.
- To inform alumni and friends of UNC about challenges and opportunities facing the University.
- To provide alumni and friends of UNC with an opportunity to offer ideas back to the University.
- To encourage alumni to become members of the General Alumni Association.
- To provide scholarships and other support to UNC students from the local area, and to encourage local admitted students to attend the University.
- To sponsor community service projects by participating in Tar Heel Service Day and other activities that reflect positively on the University.
- To influence legislators on issues of concern to the University when appropriate.

If you have any questions regarding the Carolina Club Leaders Code of Conduct, please contact coordinator of alumni clubs, Jennifer Chandler ’12 at 919-843-5115 or jennifer_chandler@unc.edu.