



HANDBOOK

FOR CLUB LEADERS

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

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GENERAL ALUMNI ASSOCIATION
COORDINATORS OF ALUMNI CLUBS
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About UNC

The University of North Carolina at Chapel Hill, the nation's first public university, serves North Carolina, the United States, and the world through teaching, research, and public service.

UNC Mission Statement

Our mission is to serve as a center for research, scholarship, and creativity and to teach a diverse community of undergraduate, graduate, and professional students to become the next generation of leaders. Through the efforts of our exceptional faculty and staff, and with generous support from North Carolina's citizens, we invest our knowledge and resources to enhance access to learning and to foster the success and prosperity of each rising generation. We also extend knowledge-based services and other resources of the University to the citizens of North Carolina and their institutions to enhance the quality of life for all people in the State.

With lux, libertas — light and liberty — as its founding principles, the University has charted a bold course of leading change to improve society and to help solve the world's greatest problems.

(Approved by the UNC Board of Governors, November 2009 and February 2014.)

About the General Alumni Association

The General Alumni Association (GAA) is a self-governed, nonprofit membership organization that serves The University of North Carolina at Chapel Hill and its many alumni, students, parents and friends. Through our programs, the GAA promotes a spirit of fellowship and loyalty among alumni, provides a continuous flow of information on the progress and needs of the University, and encourages united alumni support for its advancement.

The GAA serves Carolina and our students – past, present and future. The GAA is your Carolina connection and provides publications, programs, services, records management and legislative advocacy to support our University and to keep us connected to Chapel Hill and to each other.

UNC GAA Mission Statement

The General Alumni Association (GAA) is dedicated to the continuing service of our University and our alumni. As set forth in the GAA's constitution and by-laws, the Association shall 1) promote a spirit of fellowship and loyalty among alumni, 2) provide a continuous flow of information on the progress and needs of the University, and 3) encourage united alumni support for Carolina's advancement.

OUR MISSION IS TO
INFORM, ENGAGE AND INVOLVE ALUMNI, PARENTS
AND FRIENDS OF THE UNIVERSITY ALL OVER THE
WORLD.

About Carolina Clubs

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 around 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 Carolina Clubs Do

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 Goals

Each Carolina Club supports the following goals:

- Encourage alumni and friends of UNC to continue an interest in the University.
- Connect Tar Heels in your area with one another for social and business relationship building.
- Provide continuing education and enrichment experiences for alumni and friends of the University, highlighting UNC faculty, administrators and athletic programs with these experiences 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 their community through sponsoring community service activities that reflect the University's mission of service.

How Carolina Clubs Serve Alumni and Our University

Alumni – Carolina Club volunteers serve alumni by:

- Providing opportunities for alumni to connect, socialize, and network, through various events and activities in their local communities.
- Hosting enrichment or educational programs that provide life-long learning opportunities for alumni.
- Helping alumni stay connected to their alma mater by informing them about major events at our University or providing the opportunity for alumni to share memories of their time at Carolina.

Our University – 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 events. Clubs also occasionally provide funds for student scholarships.
- Helping represent our University to members of the North Carolina General Assembly.

General Alumni Association - Carolina Club volunteers serve the GAA by:

- Encouraging membership in the General Alumni Association.
- Serving as ambassadors for the GAA in their local community.
- Partnering to support local events and GAA events in their area.
- Serving the Carolina community via service and scholarship.

*A FEW
ENTHUSIASTIC
ALUMNI
WILLING TO
ACTIVELY SERVE AS
VOLUNTEERS IS THE
FIRST STEP TO
GETTING A CAROLINA
CLUB STARTED.*

Starting a Carolina Club

Interested in starting a Carolina Club? We are excited to learn more in hopes of expanding the Carolina Spirit to your area.

Please complete the “new club interest” form online. After review of the completed form, we will contact you at the email address or phone number provided to discuss the next steps in officially organizing a Carolina Club in your area.

Please note that club leaders must have an active UNC General Alumni Association membership. If you are not currently a member, please join online (alumni.unc.edu/join) before submitting the “new club interest” form.

Questions? Contact the GAA at clubs@unc.edu or see Appendix III, “Who to Contact” for a specific staff member.

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 a two- or three-year tenure to broaden and diversify participation on the club leadership committee.

The following is a listing of roles that the General Alumni Association recommends each club fill to ensure a successful club program. **The club leadership team must be current members of the General Alumni Association.** Realizing that clubs are not one size fits all, we understand that some clubs may thrive with the suggested essential positions listed below while others will require more leadership team members.

Essential Roles:

- Leader
- Co-Leader or Leader Elect
- Treasurer
- Communications Manager

Club Leadership Team Responsibilities

All members of the Carolina Club Leadership Team are expected to meet the following expectations in addition to the role specific responsibilities in the following pages.

- Serve as the official representatives of the local club
- Understand and adhere to the GAA operating guidelines
- Be a current member of the General Alumni Association
- Administer and supervise all club affairs
- Provide leadership and direction to the club
- If applicable, appoint committee chairs and assist with committee member recruitment
- Ensure sustainability of the club and continuity of leadership by:
 - Planning activities that appeal to a wide spectrum of interest and build pride among alumni
 - Identifying and recruiting new club volunteers
 - Sharing opportunities for area alumni to support the development and execution of club activities
 - Ensure strong leadership succession by identifying and recruiting members of the club leadership team
 - Having a clear transition plan in place
- Build a cohesive team within the club leadership team and area alumni
- Establish short and long-range objectives and goals
- Abide by GAA Club Agreement (see last page) and reaffirm your agreement annually

*PLAY HARD.
PLAY SMART.
PLAY TOGETHER
- DEAN SMITH*

CLUB LEADER

Length of Commitment: Two to three years
Time Involvement: 10-15 hours per month

Duties/Responsibilities:

- Oversee the activities of the Club Leadership Team
- Be familiar with & encourage use of all guidelines found in the Alumni Club Handbook
- Build a cohesive team amongst the volunteers and members of the club
- Lead the club in achieving the goals and expectations set-forth
- Serve as main club contact between club, General Alumni Association and interested alumni and friends in the local club area
- Coordinate and preside over monthly club leadership team meetings (lead meeting, set agenda, location, and schedule, etc.)
- Attend the Club Leader Training Workshop (not required but recommended)
- Send updates and actions items to volunteers and GAA staff following club leadership team meetings
- Has overall financial responsibility for the club
- Approve all club communications
- Ensure the completion of the club annual report each year and submit it to the General Alumni Association by the specified deadline.

CO-LEADER / LEADER-ELECT

Length of Commitment: Two to three years
Time Involvement: 5-10 hours per month

Duties/Responsibilities:

- Serve as the outreach point of contact by representing the General Alumni Association in the local area
- Perform the duties of the club leader in his or her absence
- Coordinate club programming
- Oversee committees and serve as liaison between the committee leadership and the club leadership team, including but not limited to:
 - Following up with committee leaders to ensure committees stay on target with their specific tasks
 - Assisting with recruitment of committee members to manage programs and serve as potential successors for committee leadership
 - Providing committee reports at club leadership meetings
- Attend the Club Leader Training Workshop (not required but recommended)
- Coordinate with the club leader on short and long-range objectives and goals

TREASURER

Length of Commitment: Two to three years
Time Involvement: 3-5 hours per month

Duties/Responsibilities:

- Ensure club finances are managed in accordance with General Alumni Association guidelines
- Maintain and supervise the club bank account including but not limited to:
 - Collecting and distributing the club's finances (bills, receipts, scholarship fund, etc.) in a timely manner
 - Monitoring and keeping accurate records of all club financial transactions
 - Overseeing the club budget and keeping records of all receipts and financial transactions
 - Working with event chairs to ensure that programs are within the club's budget
 - Assisting with the development of the club budget
 - Preparing financial reports for club leadership team meetings and for the annual report
- For clubs with General Alumni Association deposit accounts through Bank of America communicate with General Alumni Association Business Office and respond to all correspondence
- For clubs with checking accounts make sure there are two current signatures on file for checking account, one of which belongs to a General Alumni Association staff member
- Attend the Club Leader Training Workshop (not required but recommended)
- Manage all aspects of club scholarship initiative

COMMUNICATIONS MANAGER

Length of Commitment: Two-Three Years
Time Involvement: 3-5 hours per month

Duties/Responsibilities:

- Actively maintains club-specific social media accounts and ensure that General Alumni Association staff have co-administrator status
- Publicize club activities through email, social media and the club website by:
 - Sending event invitations and club news via GAA-provided email opt-in list
 - Updating the club's online social media presence at least once a month
 - Updating the club's Alumni Spaces webpage each month, with news and/or event information
 - Posting ALL club activities and events on club's alumni spaces website
 - Submitting broadcast request and app notification request forms in accordance with the submission guidelines provided by the GAA
 - Ensuring all club contact information remains correct and easily accessible on all club platforms
- Provide information to the General Alumni Association for printed notices in an appropriate and timely fashion
- Collect and send information/photographs to the GAA for the Carolina Alumni Review and GAA social media accounts
- Attend the Club Leader Training Workshop (not required but recommended)
- Email attendees before and after events with event reminders and thank yous for their participation
- Serve as contact for scheduling broadcast e-mails
- Take notes at club leadership meetings and send copies to club leadership team and GAA

*“I CAN LOOK BACK AT THIS
AND KNOW THAT I HAD A
HAND IN MAKING THIS
HAPPEN, GIVING FELLOW
HEELS A HOME AWAY FROM
HOME, OUR NORTHERN PART
OF BLUE HEAVEN.”*

AIME GOLDBERG MACDONALD '98
BOSTON CAROLINA CLUB

Carolina Clubs Activity Designations

Carolina Clubs are grouped into one of three tiers, **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.

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.

Leadership

- Essential leadership team roles
 - Club Leader, Co-Leader, Treasurer, Communications Manager
- All members of the leadership team agree to abide by GAA Club Agreement (see last page)

Activities/Events

- Host at least seven events per year
 - At least two community service events
 - At least one professional event
 - At least one enrichment event
 - At least one event that supports current students or new grads

Club Management

- Prepare monthly financial reports
- Submit the following annual documents
 - Annual Report
 - Club Agreement
- Have a transition plan in place
 - Club leaders may serve in the same position consecutive for two years. After serving two years in a leader position, approval must be granted annually by the GAA's in order for a leader to continue to serve in a leadership position
- Send regular and consistent club communication
 - Update Alumni Spaces website, at least once a month
 - Post to Facebook page 3 times a month
 - If the club chooses to have social media accounts on multiple platforms, they must update these 3 times a month as well

BELL TOWER CLUB

Leadership

- Essential club leader positions filled
 - Club Leader, Co-Leader, Treasurer, Communications Manager
- All members of the leadership team agree to abide by GAA Club Agreement (see last page)

Activities/Events

- Host at least five events per year
 - At least one community service project

Club Management

- Prepare monthly financial reports
- Submit the following annual documents
 - Annual Report
 - Club Agreement
- Have a transition plan in place
 - Club leaders may serve in the same position consecutive for two years. After serving two years in a leader position, approval must be granted annually by the GAA's in order for a leader to continue to serve in a leadership position
- Send regular and consistent club communication
 - Update Alumni Spaces website, at least once a month
 - Post to Facebook page 3 times a month
 - If the club chooses to have social media accounts on multiple platforms, they must update these 3 times a month as well

TAR HEEL CLUB

Leadership

- Essential club leader positions filled
 - Club Leader, Co-Leader, Treasurer, Communications Manager
- All members of the leadership team agree to abide by GAA Club Agreement (see last page)

Activities/Events

- Host at least three events per year

Club Management

- Annual Report

Event Reporting For Activity Designations

All events must be posted each month on Alumni Spaces in order to count towards activity designation status. Each event must be designated with one program category (listed below). Please select the category that reflects the main focus for the event.

Program Categories

Clubs activities should fit into one of the following categories below.

ATHLETICS

Events that revolve around athletics. Examples of athletic events include:

- UNC game watches
- Outings to local sporting events (collegiate, amateur, major league events)
- Club team that participates in local athletic leagues (i.e. softball, kickball, etc.)

COMMUNITY SERVICE

Events where alumni are able to contribute to the benefit of the community at large or persons that make up a community. Examples of community service events include:

- Collecting items (food, school supplies, books, coats, diapers, shoes etc.) for others
- Volunteering at a local organization
- Hosting a Tar Heel Service Day event
- Participating in a house build
- Making blankets, hats or scarves for homeless shelters, care facilities, or hospitals
- Mentoring

ENRICHMENT/LIFE-LONG LEARNING

Activities or programs that provide opportunities for alumni to expand and enrich their minds. Example of these types of programs include:

- Book clubs
- Performing arts event
- Museum visit
- Workshops or experiences (i.e. flower arranging; line dancing, home buying 101, rock climbing, coffee tastings, etc.)
- Behind the scenes tours (athletic venues, restaurant tours, amusement parks, etc.)

PROFESSIONAL

Events that provide alumni the opportunity to network with fellow Tar Heels, ACC school alumni, and others, or gain knowledge and build skills beneficial to their professional life.

Examples of professional events include:

- Career chat happy hours covering various topics (i.e. work-life balance; finding opportunities for growth, etc.)
- Workshop on various areas of conducting a successful job search (i.e. dressing for success; the best resume format for your job aspirations, etc.)
- Hands-on workshops (i.e. creating your elevator pitch; social media 101; creating a digital portfolio, etc.)

SOCIAL

Events designed to engage alumni with each other and through fun experiences. Examples of social events include:

- Patio party
- Brunch
- Trivia night
- Tar Heel family game night
- Outings (i.e. mini golf; laser tag; hiking, bowling etc.)
- BBQ or cookout events

STUDENT/NEW GRAD SUPPORT

Efforts and events that focus on supporting current UNC students or new Tar Heel graduates in your area. Examples of these types of events include:

- Scholarship fundraisers
- Summer send offs
- Fall, winter or spring break socials for current UNC students
- “Welcome to the City” event that take place during the summer to welcome new UNC grads to your local area; allowing them to connect with the local club and meet fellow Tar Heels.

Suggested Programming for Each Activity Designation

OLD WELL

- 2 athletic OR social events
- 2 community service events
- 2 enrichment OR professional networking events
- 1 student/new grad event

BELL TOWER

- 1 athletic OR social event
- 1 community service events
- 2 enrichment OR professional networking events
- 1 student/new grad event

TAR HEEL

- 1 athletic event OR social event
- 1 community service events
- 1 other event

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 GAA 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 (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 GAA provides an online registration system that can collect funds for ticket sales and RSVPs. Contact the GAA to set up an event registration page.

The GAA 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 also expected to 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 within reason. 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 Club Leader 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 GAA Clubs an invoice or receipts for a check to be cut by the GAA.

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 online negotiation 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 Club Leader and/or Treasurer. Purchase cards are used like credit cards. The GAA business office controls initiating or cancelling a card as well as adjusting purchasing limits. If a club wishes to have their limit increased temporarily, a request must be emailed to the GAA to approve. Once the business office receives the approved request, the increase can be made instantaneously. Purchase card statements for 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 Club Leader and/or Treasurer of the respective clubs. If there is no activity for the month, no reconciliation is emailed.

Contact the GAA if your club wishes to open a new deposit account.

Scholarships

Carolina Club Scholarships demonstrate a commitment to the local community and to the education of its current Tar Heels. Scholarships can provide a meaningful purpose behind clubs' more socially oriented activities. While scholarships are not required, some clubs report their most satisfying programs include the awarding of a scholarship to local student(s).

Carolina Club scholarships are need-based scholarships for students from your club's region. Scholarship recipients are selected by the Office of Scholarships and Student Aid based on club areas and financial need determined by the FAFSA. Only sophomores, juniors and seniors are eligible for Carolina Club Scholarships.

The minimum for a club scholarship is \$500*, but larger contribution amounts can reach additional students or increase the support for one student. The higher a scholarship is, the more impact it will have on a student's financial capability. Here is what various levels of scholarship can approximately provide for one student.

- \$500: One semester of books and supplies for a student (approx.)
- \$1000: One year of books and supplies for a student (approx.)
- \$1500: One year of personal expenses for a student (approx.)
- \$2000: One semester of meals (approx.)

Clubs can divide their contribution toward multiple scholarships; however each must be in equal amount (i.e. a \$1,500 contribution must be two \$750 scholarships, not a \$1,000 and a \$500 scholarship). Clubs decide on an annual basis (in response to the scholarship commitment email sent from the GAA in the spring) if they will award a scholarship for the following fiscal year.

If your club is interested in raising funds for a scholarship, contact the General Alumni Association. The General Alumni Association works directly with UNC's Office of Scholarships and Student Aid.

Note: Because club scholarships are based on financial need, the recipient's name remains private until they contact the club directly. The General Alumni Association will send a letter to the student chosen for your club's scholarship in the fall. In this letter, the student will be asked to contact your club's chair or president to acknowledge that they received the scholarship. Scholarship recipients will also be encouraged to write thank you notes to their club or some may even want to reach out for possible networking connections.

Important dates for Carolina Club Scholarships

May 15: Deadline for clubs to notify GAA of the amount that will be committed to scholarship and the number of students you would like to support.

June 1: Deadline for clubs to transfer funds to GAA; note for clubs with GAA deposit bank accounts: the GAA will withdraw the funds from your account and will send a check on your behalf to the Office of Scholarships & Student Aid.

August TBA: Scholarship recipients notified of scholarship

September TBA: On campus reception for scholarship recipients, scholarship recipients are encouraged to write thank you notes to club leaders, orders for signed basketballs

Alumni Lists

The GAA does not provide lists of local alumni. We will gladly send broadcast emails to assist with the recruitment of club leadership and the promotion of club events. Broadcast emails are sent to all living alumni in your club area for whom the GAA has an email address, except for individuals who have opted out of receiving email communication from the GAA.

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 Registration Liabilities and Insurance

The General Alumni Association maintains a comprehensive commercial package/general liability insurance program. This coverage extends to local clubs and local club 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 policy). 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: 3/11/21
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.

GAA Club Support

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. If you want to talk out an idea, get advice on events, etc. please give us a call.

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 (alumni.unc.edu/clubemailrequest) about two weeks before the send date. A full list of broadcast dates [can be found in the Club Leader Toolkit](#)

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. You can also invite alumni and friends to join the opt-in list directly at alumni.unc.edu/cluboptin.

TRAINING- Training and resources on various topics related to leading a Carolina Club will be available to club leaders. This may take the form of online trainings, webinars, conference calls and the club leader's resource library.

CLUB LEADERS CONFERENCE – This is a leadership 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. We anticipate including virtual attendance

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 arrange for speakers from the University to attend a club event.

GAA MEMBER DISCOUNTS - The GAA can offer member discounts for many club events.

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.)

GAA Club Support (continued)

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.

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

CAROLINA CLUBS

UNC GENERAL ALUMNI ASSOCIATION

Carolina Club Agreement

To be recognized by the General Alumni Association as an official Carolina Club and to receive all support provided therein, a club must meet the basic criteria listed below. These criteria ensure that each club serves the best interests of its local alumni, our University, and the UNC General Alumni Association.

- Demonstrate the club 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.
- Elect or select a Club Leader to serve as the main representative of the club to the General Alumni Association.
- Leadership team fulfills all the duties of recommended essential leadership positions.
- Extend membership to include any alumnus or friend of the University
- Host events in facilities where all alumni and friends are welcome on an equal basis.
- Inform the General Alumni Association of all club-sponsored events and submit post-event information and attendance count through Alumni Spaces after each event.
- Submit an Annual Report (provided by the GAA) on or before the date prescribed by the Coordinator of Alumni Clubs.
- 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.

This includes, but is not limited to (if applicable):

- Maintain positive financial balance each month
- Prepare monthly financial reports
- Have a deposit account through the GAA
- Protect confidential information shared with the club leadership team for official business only (i.e. constituent data).

Carolina Club Leadership Team Member Agreement

Members of Carolina Club leadership teams should adhere to the highest standards of personal and professional integrity. As a volunteer representative of the GAA and The University of North Carolina, I agree to:

- Maintain current membership in the UNC General Alumni Association.
- Keep my contact details on file with the GAA current.
 - To view and update your information, visit: gaa.unc.edu/.
- Act in the best interest of the University and the GAA, in accordance with all GAA policies and procedures as detailed in Club Leaders Handbook.
- Fulfill the responsibilities of the club leadership position that I have chosen to serve in.

- Work cooperatively and communicate transparently with all club leadership members.
- Provide a welcoming and inclusive environment for all UNC alumni and friends
- Interact with volunteers, staff and other constituents in a responsible, respectful, positive and professional manner at all times.
- Refrain from posting personal opinions, including but not limited to, matters relating to the GAA or the University, on club communication outlets (emails, printed pieces, websites and social media).
- Actively engage with UNC alumni and friends at club hosted events and activities
- Encourage alumni and friends to become members of the GAA
- Protect confidential information shared with the club leaders for official business only (i.e. constituent data).
- Report unethical or inappropriate behavior to GAA staff liaisons

Information Security

The GAA 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 GAA states that the information provided to club leaders may only be used for University and GAA 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, including commercial, political, or solicitation, is strictly prohibited.

By signing below, we acknowledge that we have read, understand and agree to abide by the GAA Carolina Club Agreement. We also understand that failure to abide by the Carolina Club Agreement may result in termination of club leaders and/or club.

Club Name

Name (Print)

Signature

Position

Date

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

If you have any questions regarding the Carolina Club Leader Agreement, please contact the Coordinator of Alumni Clubs, at 919-962-6705 or clubs@unc.edu.

Keep a copy of this agreement to reference as needed.

Carolina Club Leadership Team Member Agreement
Additional Signatures

Club Name

Name (Print)

Signature

Position

Date

Name (Print)

Signature

Position

Date

Name (Print)

Signature

Position

Date

Name (Print)

Signature

Position

Date

Name (Print)

Signature

Position

Date

APPENDICES

Appendix I

Additional Volunteer Descriptions

Coordinator of Programs/Event Chair

Coordinator of Community Service

Appendix II

GAA Staff Contacts

Appendix III

General Alumni History and The George Watts Alumni Center

What the General Alumni Association is and is not

Appendix IV

Membership in the General Alumni Association

COORDINATOR OF PROGRAMS/EVENT CHAIR

Length of Commitment: 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 Leader 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
- Attends the Club Leaders Training Workshop (optional, but highly recommended)

COORDINATOR OF COMMUNITY SERVICE

Length of Commitment: 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)

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.

Staff Contacts at the General Alumni Association

CAROLINA CLUB COORDINATORS

The Carolina Club Coordinators share responsibility for the Carolina Clubs, with each serving as the primary point of contact for about half of all Carolina Clubs. Within North Carolina, their portfolios are separated county by county. Outside of North Carolina they are separated by state, or country internationally.

Anna Brooks Whichard '10

(919) 843-5115

annabrooks_whichard@unc.edu

North Carolina Counties:

- Ashe
- Avery
- Bertie
- Buncombe
- Camden
- Carteret
- Cherokee
- Chowan
- Clay
- Cleveland
- Craven
- Currituck
- Dare
- Durham*
- Edgecomb
- Forsyth**
- Franklin
- Gaston
- Gates
- Graham
- Granville
- Greene
- Guilford**
- Halifax
- Haywood
- Henderson
- Hertford
- Hyde
- Jackson
- Johnston
- Jones
- Lenoir
- Lincoln
- Macon
- Madison
- Martin
- McDowell
- Mecklenburg**
- Mitchell
- Nash
- Northampton
- Pamlico
- Pasquotank
- Perquimans
- Person
- Pitt
- Polk
- Rutherford
- Swain
- Transylvania
- Tyrell
- Vance
- Wake*
- Warren
- Washington
- Watauga
- Wayne
- Wilson
- Yancey

US States:

- Alabama
- Arkansas
- Colorado
- Florida
- Georgia
- Kansas
- Kentucky
- Louisiana
- Minnesota
- Missouri
- Nebraska
- Nevada
- Oregon
- South Carolina
- Tennessee
- Utah
- Virginia (South of Richmond)
- Washington

International^:

- China
- South Korea
- Singapore
- Australia
- Thailand

Joe Petrizzi '13
(919) 962-6705
joe_petrizzi@unc.edu

NC Counties:

- Alamance
 - Alexander
 - Alleghany
 - Anson
 - Bladen
 - Brunswick
 - Burke
 - Cabarrus
 - Caldwell
 - Caswell
 - Catawba
 - Chatham
 - Columbus
 - Cumberland
 - Davidson
 - Davie
 - Duplin
 - Forsyth**
 - Guilford**
 - Harnett
 - Hoke
 - Iredell
 - Lee
 - Mecklenburg**
 - Montgomery
 - Moore
 - New Hanover
 - Onslow
 - Orange*
- Pender
 - Randolph
 - Richmond
 - Robeson
 - Rockingham
 - Rowan
 - Sampson
 - Scotland
 - Stanly
 - Stokes
 - Surry
 - Union
 - Wilkes
 - Yadkin

States:

- Alaska
- Arizona
- California
- Connecticut
- Delaware
- Hawaii
- Illinois
- Maine
- Maryland
- Massachusetts
- Michigan
- New Jersey
- New York
- Ohio
- Pennsylvania
- Rhode Island
- Texas
- Virginia (Richmond and North)
- Washington, DC

International^:

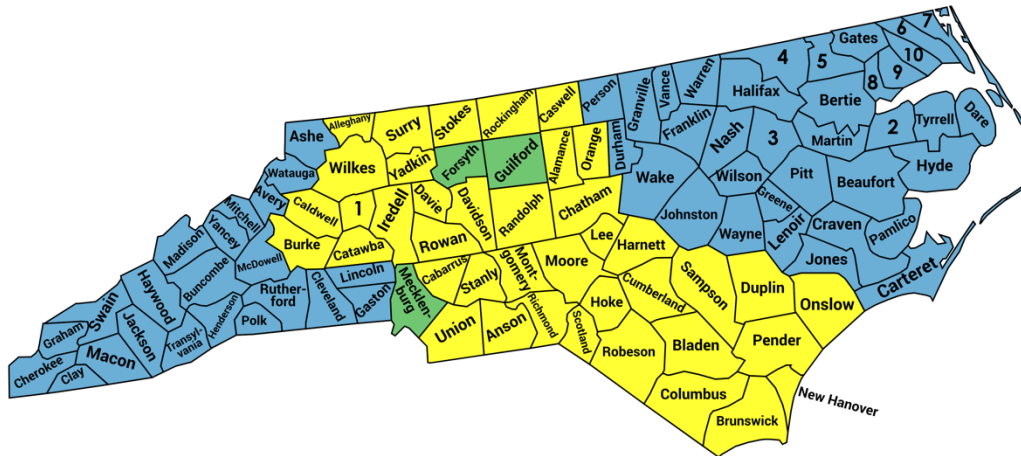
- Canada
- Egypt
- France
- Germany
- Switzerland
- United Kingdom

*The Triangle (Wake, Durham and Orange counties) are currently served directly by the GAA due to the close proximity to Chapel Hill and large alumni populations.

**Forsyth (Winston-Salem), Guilford (Greensboro) and Mecklenburg (Charlotte) counties are shared by both coordinators due to their large alumni populations. Feel free to contact both coordinators with your needs.

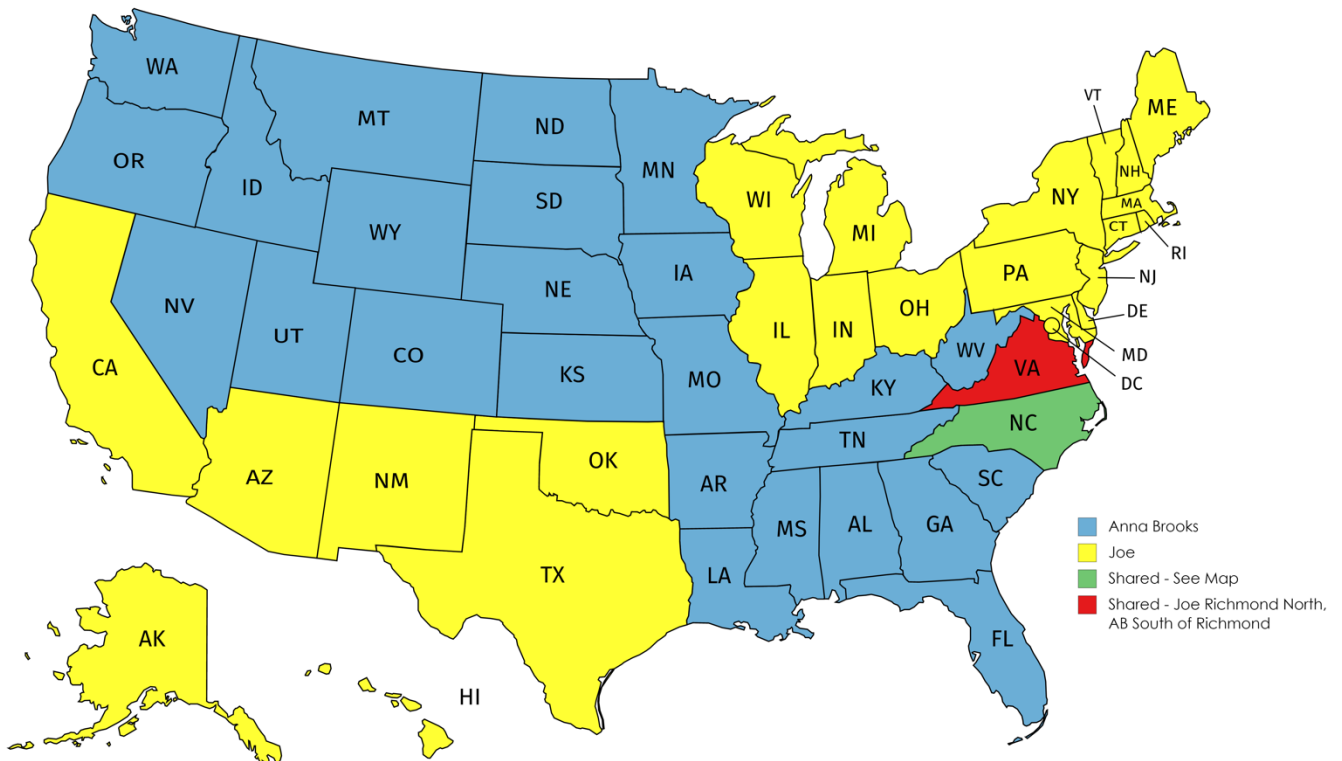
^We have assigned countries where we currently have clubs internationally. If you are interested in forming a new international club outside of these countries, please contact both coordinators.

- Joe
- Shared
- Anna Brooks



- Alexander
- Washington
- Edgecombe
- Northampton
- Hertford
- Camden
- Currituck
- Chowan
- Perquimans
- Pasquotank

Created with mapchart.net ©



- Anna Brooks
- Joe
- Shared - See Map
- Shared - Joe Richmond North, AB South of Richmond

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.