



Affinity Group Handbook

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Welcome

Welcome to the Cal State San Marcos Alumni Association Affinity Group Handbook. CSUSM Alumni Affinity Groups offer alumni an opportunity to stay in touch with their alma mater and enjoy benefits and privileges that are not available without formal affiliation through the Alumni Association.

The primary purpose for which an Affinity Group is formed is to advance and establish a mutually beneficial relationship between California State University San Marcos (CSUSM), alumni and friends, and to provide an avenue for alumni to continue their connections with the University through the CSUSM Alumni Association.

The **Affinity Group Handbook** outlines the operating guidelines and procedures necessary to successfully form and maintain an officially recognized CSUSM alumni affinity group. Use this handbook as a resource to make the start-up and maintenance of your affinity group as easy and effortless as possible. We encourage each affinity group to be creative and innovative in its activity planning, as each affinity group is unique in its membership, programming, and geographic location.

By participating in the affinity group program, you will maintain a connection with CSUSM while receiving a multitude of benefits.

We appreciate your leadership efforts and are committed to assisting you in your endeavor to form an Alumni Affinity Group.

Sincerely,



Lori Brockett
Sr. Director, Alumni Engagement and University Events
Executive Director, CSUSM Alumni Association

About the CSUSM Alumni Association

The CSUSM Alumni Association is a committed partner of the University. The Association promotes the interests of the CSUSM alumni, current students, and the University, whose memories and benefits we wish to perpetuate.

Goals of the Association include:

- Establishing alumni tradition
- Promoting CSUSM as THE university of first choice in Southern California
- Providing leadership and volunteerism through participation in Board of Directors and various other committees
- Participating in student mentoring and recruitment
- Legislative advocacy

Alumni Association Mission and Vision

Mission Statement

The Mission of the CSUSM Alumni Association is to support and encourage the advancement of the University while fostering lifelong Cougar Pride, loyalty and involvement between alumni, local businesses and the community at large.

Vision

We are alumni working cooperatively with and for students, faculty, administration and community/business leaders to promote the welfare and integration of California State University San Marcos into the fabric of Southern California.

Membership

The CSUSM Alumni Association is a dues paying organization. Though the Association's major events are open to all alumni, there are benefits to membership including member exclusive events and affinity group participation. To join, alumni pay for annual or lifetime access to the benefits and privileges of being a member. New graduates can receive two years of membership for the price of one (\$30 for two years) during GradFest each spring and up to 6 months post-graduation.

The current membership price structure is:

Membership Type	Cost
New Grad 2-Year Membership	\$30.00
Alumni Annual Membership	\$30.00
Alumni Lifetime Membership*	\$300.00

*Lifetime memberships are available on a 4 month or 12 month payment plan if desired.

About Cal State San Marcos Affinity Groups

Affinity groups are a collection of alumni who share a common affinity for the university and are committed to promoting the missions of California State University San Marcos and the CSUSM Alumni Association.

The primary purpose for which an affinity group is formed is to engage and establish a mutually beneficial relationship between California State University San Marcos (CSUSM), alumni and friends, and to provide an avenue for alumni to continue their connections with the university through the CSUSM Alumni Association. This is achieved through regular communications, networking events, group volunteerism and professional development activities.

The CSUSM Alumni Association understands the importance of alumni affinity groups and is committed to establishing, and building a strong and successful program. Association staff will provide assistance to affinity groups for communications and outreach, event planning and registration, financial resources and support and act as an Association liaison to affinity group members. Affinity groups are expected to abide by and promote the guiding principles as written in this handbook.

Recognized Affinity Groups

A recognized affinity group maintains at least 20 or more CSUSM Alumni Association members, has a common goal, has the approval of CSUSM Alumni Association Board of Directors and has completed and maintained the requirements of recognition as defined in the guiding principles as written in this handbook.

A recognized affinity group shall conduct its business in accordance with the California State University San Marcos Alumni Association bylaws, Affinity Group Handbook, and all other applicable state and university policies.

Affinity group recognition provides access to services, benefits, and support available through the CSUSM Alumni Association. In turn, affinity group recognition strengthens the alumni community and its relationship with the University for the purpose of membership benefit and University-wide service.

Affinity group members engage in sharing and participating in intellectual, cultural, and athletic life, as well as social and networking opportunities, to enhance professional development. Affinity groups enhance and enrich the scholarly and cultural resources of the CSUSM Alumni Association and the University.

Types of Affinity Groups and Recognized Classifications

Affinity groups have the **option** to identify themselves as any one of the following:

- Chapter
- Network
- Club
- Society

Affinity groups **must** fall under one of the below classifications:

- **Cultural/Heritage** - Alumni who share, identify with, and would like to participate in cultural and/or ethnic groups.
- **Professional** – Alumni of particular colleges, departments, and other academic organizations.

- **Regional** – Organized on a geographical basis in cities and counties within the California state and throughout the United States, and internationally, wherever there is sufficient interest and a concentration of alumni reside.
- **Shared Interest**– Alumni who share a specific interest such as athletics, student activities, etc.

Guiding Principles

Formation and Operations

- **Gather Interest:** Plan a gathering of the core group of alumni. At this informal gathering, share with the assembled group the idea of an alumni affinity group and collect names of people who might be willing to participate.
- **Initial Alumni Meeting:** Setup an initial meeting for all alumni who have expressed an interest in the potential affinity group. At this meeting your primary goals should be for alumni to become acquainted with one another, delegate responsibilities, brain storm ideas for events and gather names on contact information.
- **Leadership:** Once the initial meeting has held, an affinity group must identify an alumni leader(s) from the individuals who attended the meeting. Affinity group leaders are responsible for communication between the Alumni Association and affinity group members, and ensuring their group adheres to the guiding principles. An ideal candidate for leadership is an individual who is motivated, passionate and highly involved with CSUSM.
- **Intent to Form:** Alumni who are interested in starting a new affinity group will be tasked with completing the "Intent to Form" application which will be used by Alumni Association staff and the Alumni Board of Directors to evaluate the viability of the proposed group. Through the application, an alumnus must identify the shared affinity, contain the signatures of at least 10 Association members in good standing, identify leadership of the group, as well as the group's potential for growth and ability to advance the missions of the university and the Association.
- **Self-Governance:** Affinity groups are self-governing bodies and will determine their own guidelines, general structure, leadership positions, board/elections/bylaws, events and communications.
- **Regular Communications:** group leaders are expected to meet and/or communicate with group members and the Alumni Association for the purpose of sharing and discussing group plans and updates.
- **Growth and Support:** The Alumni Association allocates \$250.00 to each affinity group for initial start-up costs. Once a group becomes officially recognized, it will be funded through Alumni Association membership revenue which includes a \$5.00 allocation for each annual membership and \$25.00 for each lifetime membership.
- **Oversight and Approval:** Any decisions, disputes, marketing and communications from affinity groups must be submitted to the CSUSM Alumni Association for approval.
- **Annual Renewal:** All affinity groups will come up for review at the beginning of each fiscal year and will be required to submit annual renewal paper work. Renewal requirements/checklist, as well as renewal paper work are available on the Affinity Group Resource page of our website.

Suspension/Dissolution

The CSUSM Alumni Association Board of Directors reserves the right at any time to suspend or dissolve any affinity group, or to remove an affinity group member from a leadership role, for the following reasons:

- Failure to meet the requirements as set forth in the affinity group guidelines.
- Taking any action detrimental to the University or the CSUSM Alumni Association.

- Any unauthorized or improper use of the CSUSM Alumni Association's name, stationary, mailing lists, non-profit status, etc. (See Legal Issues).
 - Maintaining a shadow database of member or other alumni.
 - There is no longer interest in maintaining this group by group leadership and/or constituents.
1. If a group or leader does not comply with these guidelines set forth, the CSUSM Alumni Association Executive Director shall, by written or verbal notice, require the affinity group or group leader to comply within a reasonable period or have its recognition as an affinity group or as a group leader withdrawn.
 2. In the event the group or group leader fails to comply within the period specified, the CSUSM Alumni Association Executive Director shall provide written notice to affinity group leadership and the CSUSM Alumni Association President of recommendation to withdraw recognition of the affinity group or group leader. Withdrawal of recognition will be voted upon by the CSUSM Alumni Association Board of Directors.
 3. Once the official recognition has been withdrawn, the affinity group may no longer use the University's name, facilities, equipment or Alumni Association resources. Should the group fail to cease these activities, the CSUSM Alumni Association and/or University shall take legal action as necessary. A removed affinity group leader may no longer utilize the group's database, resources or other related material and must be returned to the Alumni Association Executive Director within one week from removal.

Alumni Contact Information

The CSUSM Alumni Association is not permitted to release alumni contact information due to information privacy and security. Any and all communications to affinity group members must go through the CSUSM Alumni Association, including email and hard copy mailing. Lead time for communications is three weeks for digital and six weeks for hard copy print mailings. Any alumni contact information collected at affinity group events must be immediately submitted to the Alumni Association for database updates. Affinity groups are not permitted to maintain shadow databases of members or other alumni. Doing so is grounds for suspension and/or dissolution of the affinity group.

Legal Issues

Legal Relationships: CSUSM alumni affinity groups are recognized entities of the CSUSM Alumni Association. The CSUSM Alumni Association operates under the auspices of the CSUSM Foundation, and is subject to the authority thereof.

Contracts and Agreements: Because affinity groups are a part of the CSUSM Foundations 501 (c) (3) corporate structure, any matters involving contracts over \$500 financial liability, insurance, product licensing, corporate partners and solicitations, etc., must be approved by the CSUSM Alumni Association and the CSUSM Foundation. Questions concerning these matters should be directed to CSUSM staff.

Issues of Insurance: CSUSM Alumni Association affinity groups are generally covered under the auspices of their approved University charter. However, when having an event, some venues and/or parties may require the group to have a certificate of insurance and liability coverage. Affinity groups must contact the CSUSM Alumni Association prior to planning events for approval.

Product Licensing/CSUSM Logo: All use of the CSUSM logo must be approved through the CSUSM Alumni Association.

Amendments to Bylaws (if applicable): Affinity Group bylaws must be submitted for review, and approved by the CSUSM Alumni Association Board of Directors. The CSUSM Alumni Association Board of Directors has the ability to amend or insert language into an affinity group's bylaws to make these bylaws consistent with the policies and procedures of the CSUSM Alumni Association.

Event Guidelines

Successful event planning is the key to successful affinity groups. Keep in mind the overall objectives of both the CSUSM Alumni Association and your affinity group in all program planning. For many, alumni events represent the only contact they have with other CSUSM alumni or the University. Advanced planning and execution are important to the success of each event.

Event Objectives

- **Establish a committee:** Event committees are necessary to properly plan and execute events. Sub-committees can be formed to organize specific activities at the event. This will spread the workload, and develop future leaders for your affinity group.
- **Encourage Board member and non-board member involvement:** The more involvement you seek from regular members, the stronger your alumni affinity group becomes.
- **Involve the Alumni Association:** Advanced notice given to the Alumni Association of your upcoming event will increase your visibility and communication to alumni members.
- **Event Balancing:** Are your events spaced equally throughout the year? Are they appealing to your constituents? Do you have diversity and a blend of social, cultural, athletic, and friend-raising events? Do you plan your events in conjunction with the Alumni Association's events? Consider doing a brief, informal survey among your constituents to determine their specific needs and interests.

Event Basics

Below are 10 event basics that will assist you and your group in planning and executing a successful event.

1. **Purpose:** Why have the event? What are you trying to accomplish? Ensure event variety and location so that no one is excluded by cost.
2. **Permission:** Do you have the Alumni Association approval and necessary funds? Make sure all agreements with suppliers are in writing.
3. **Budget:** How much is the overall cost? Where will the funds come from? Do you expect to generate revenue? Aim to make events self-supporting by always adding tax and services charges to event admission, plus a small override to cover unexpected costs. Use a 10%-20% no-show figure in determining guarantees. Identify all the costs involved with the event, i.e. room, meal, beverage, parking, a/v equipment, etc.
4. **Committees:** Do you have a committee of affinity group members nominated to handle the planning process for affinity group events? Develop a master plan and assign specific tasks to committee members to spread the workload evenly. Choose people who are willing to see the project from start to finish.
5. **Timeline:** Not only do you need to decide when your event takes place, you need to decide on deadlines for when certain tasks will be completed, i.e. payment, invitations, etc. Utilize the available forms, checklists, and spreadsheets to organize the event. Have you determined the date, time and place of the event? Decide on these at least four months in advance! Verify with the Alumni Association that there is no conflict with other major University events.

6. **Logistics:** Pay attention to details such as: room size, meal & beverage cost, a/v equipment, parking, etc. Select a meeting place conducive to the event such as University and hotel meeting rooms, private homes, picnic areas, etc. Every event has hundreds of little details. Try to plan ahead by breaking them down into components such as music, rooms, advertising, catering, etc.
7. **Invitees:** Who and how many will you invite? Any special guests to include? Touch base with presenters and speakers early.
8. **Notification:** How will you notify guests? Formal invitations, flyers, letters, personal calls, E-mail? Set a deadline of at least four weeks prior the event to send out notification. Make sure it contains subject matter, date, time, location, attire, agenda, and contact name for questions.
9. **Advertising:** What type of publicity will effectively advertise your event? Web page, campus newspaper, radio, or other media are sources to advertise your event.
10. **Follow-Up:** Keep track of people and organizations that help out as the event is planned and executed. Thank you notes to everyone involved puts a personal touch to the event and it's a good way to get them to help again. Evaluate the success of your event by soliciting feedback from committee members.

Resources for Affinity Groups

The CSUSM Alumni Association encourages growth and strength of the affinity group program. CSUSM Alumni Association provides the following to assist groups in reaching their fullest potential.

- **Advertisement & Communication** – Publicity through Alumni Association publications, i.e., CSUSM Alumni Association communications, affinity group webpage, social media. Use of University logos with permission.
 - Webpages will be offered to all officially recognized affinity groups. The CSUSM Alumni Association will develop and maintain a page for each group with content provided by each group.
 - All affinity group social media is subject to approval by the Alumni Association.
 - The Alumni Association must be given administration rights to all affinity group social media.
 - Requests for alumni communications must be sent to Alumni Association staff three (3) weeks prior to send date to allow time for edits and final approval.
- **Database Management** – Maintenance and upgrades of membership information on the alumni database. Membership information/list retrieval from the database will also be provided.
- **Financial Support** - Funding through membership revenue and incentive programs. Overall general liability insurance coverage upon event approval.
- **Meeting/Event Assistance** – On and off-campus facility reservations; layout, design, and distribution of invitations, flyers, and brochures. Also assistance with the organizing, planning, and implementing of events with prior approval.
 - Notice of event must be sent to Alumni Association staff six (6) weeks prior to event date for approval.
- **Membership Benefits** - CSUSM Alumni Association existing membership benefits.

For additional information about our Affinity Group Program, please refer to the Affinity Group Resource page on our website or feel free to contact the Alumni Office at 760-750-4406 or alumni@csusm.edu.