

Approval Date: May 1, 1999

Parent Policy: [Alumni Association Membership Policy](#)

Alumni Branches and Chapters Formation and Management Procedure

Office of Administrative Responsibility:	Alumni Affairs
Approver:	Vice-President (Office of Advancement)
Scope:	Compliance with University procedure extends to all members of the University community.

Overview

Information on the management of **Alumni Branches** and **Chapter Alumni Associations** (chapters) and any fundraising that either alumni group undertakes.

Purpose

To ensure the proper management of University of Alberta alumni branches and chapters in accordance with the bylaws of the University of Alberta Alumni Association.

PROCEDURE

1. FORMATION OF A BRANCH

Ten regular alumni members (or more) can petition the Alumni Association Council to form an Alumni Branch in a town/city where more than 200 alumni reside. These ten members must reside in the same geographic location (outside of Edmonton) and be prepared to promote the branch objective stating that they intend to maintain an active existence within the proposed objectives of the branch. A proposed constitution and bylaws of the branch alumni association shall also be submitted.

2. FORMATION OF A CHAPTER

Twenty-five regular alumni members (or more) who are graduates of the faculty, department, specialized study or specialized interest can petition the Alumni Association Council to form a chapter, or to recognize an existing association as a chapter association. Approval of the respective Dean or Department Chair (where applicable) should also be included. The existing or proposed constitution and bylaws of the chapter alumni association shall also be submitted.

3. FINANCIAL MANAGEMENT ACTIVITIES OF BRANCHES AND CHAPTERS

- a. Financial activities of alumni branches and chapters will comply with the applicable policies and procedures of the University of Alberta.
- b. An alumni branch or chapter can arrange for the Office of Alumni Affairs to open, hold and administer a trust account in the name of the branch or chapter provided the identified need meets the university criteria for trust accounts. Each branch or chapter will obtain a unique **chart of accounts** identifier per need to assist in tracking costs and revenues. All charges or invoices against the account must be paid through the Office of Alumni Affairs. Charges or invoices will not be paid unless the person(s) identified in that chapter's bylaws has signed off or otherwise authorized payment of the invoice/charges.

c. Chapters and branches are entitled to fundraise for the purpose of creating bursaries, scholarships, and prizes for the University of Alberta. Some Chapters fundraise for operating funds because they are not faculty based. All fundraising activities are governed by the development and advancement policies and procedures of the University of Alberta.

DEFINITIONS

Any definitions listed in the following table apply to this document only with no implied or intended institution-wide use. [\[▲Top\]](#)

Alumni Branches	Groups formed by University of Alberta alumni who reside in geographic locations outside of Edmonton. Branches help promote the interest and welfare of the group; provide overall support to the University of Alberta; create a channel for communication; and provide networking, education and social opportunities for their members.
Alumni Chapters	Groups formed by University of Alberta alumni to support the goals of and recognize a special affiliation to a current or degree-granting faculty of the university, a department, or specialized study or interest area. Examples are the Mixed Chorus Alumni Chapter, the Gateway Alumni Chapter and the Medical Alumni Chapter. Chapters help promote the interests and welfare of the group and provide overall support for the University of Alberta, create a channel for communication and provide networking, education and social opportunities for their members.
Chart of Accounts	A chart of accounts defines the financial structure of an organization. Coding an organization's accounting and budgetary transactions according to its chart of accounts is the basis for managing and reporting on its financial operations.

FORMS

There are no forms for this Procedure. [\[▲Top\]](#)

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