

# Berkeley Clubs International Volunteer Handbook

A guide for alumni starting and managing  
international alumni clubs



Berkeley  
Clubs  
International 

UNIVERSITY OF CALIFORNIA, BERKELEY



**TABLE OF CONTENTS**

Welcome . . . . . 2

Overview . . . . . 3

Getting Involved in Berkeley’s Global Community . . . . . 4

Berkeley Club Requirements . . . . . 5

Helpful Tips for Starting a Berkeley Club. . . . . 6

Resources. . . . . 8

Leadership Committee. . . . . 9

Finance . . . . . 12

Communications, Marketing, and Design . . . . . 13

Events . . . . . 18

  

Appendix

Appendix: Volunteer Agreement . . . . . 22

Appendix: Confidentiality Statement . . . . . 23

Appendix: Bylaws. . . . . 24

Appendix: Annual Recognition Compliance Questionnaire . . . . . 26

Appendix: Events Calendar Form. . . . . 28

## **WELCOME**

### **GREETINGS FROM THE UNIVERSITY OF CALIFORNIA, BERKELEY!**

On behalf of the students, faculty, and staff of Berkeley, thank you for your steadfast commitment to and enduring support of your alma mater. We appreciate your interest in leading efforts to build an alumni community in your area.

With more than 26,000 alumni living abroad, Berkeley's global community has been growing steadily, playing a significant role in securing the university's status as a preeminent public teaching and research university in the world. The Office of International Relations, your liaison to the university, strives to support its international alumni in building and sustaining strong Berkeley communities around the world.

Berkeley international clubs are diverse in size and scope, ranging from a single alumnus acting as a regional contact to a leadership committee, frequent and wide-ranging events, and a strong online presence. As volunteer leaders, you play a vital role in shaping the goals and activities of your club and in serving as the face of Berkeley for alumni, parents, and friends in your area. This handbook is designed to offer ideas, guidance, and support as you work toward extending Berkeley's reach in your community.

If you have any questions or concerns about club management, please contact Florence Gaberell-Julien, associate director of International Relations, at [fgjulien@berkeley.edu](mailto:fgjulien@berkeley.edu) or +1.510.642.9239. We look forward to working with you!

Office of International Relations  
University of California, Berkeley

## OVERVIEW

The Office of International Relations' mission is to support Berkeley's teaching, research, and public service priorities by engaging strategically with international alumni and other constituents to develop relationships that inspire meaningful affiliation and philanthropy.

One of our primary functions is to support Berkeley's international alumni clubs (formally called Berkeley Clubs). The clubs seek to build a vibrant community of engaged alumni, parents, and friends that serves three primary goals:

- To foster a meaningful, lifelong connection to each other and to the university;
- To continue the process of lifelong learning; and
- To inspire goodwill and support for Berkeley.

Berkeley Clubs' purpose and initiatives align with the university's mission of teaching, research, and public service and are consistent with its principles of community. They reflect Berkeley's passion for critical inquiry, debate, discovery, innovation, and our deep commitment to contributing to a better world. Every member of the Berkeley community, here and abroad, can participate in sustaining a safe, caring, and humane environment in which these values thrive.

It is a common misperception that Berkeley Clubs fall under the umbrella of the Cal Alumni Association (CAA), which only manages domestic clubs. Instead, the Office of International Relations coordinates and manages the alumni network overseas. This handbook outlines a variety of ways we provide you support and best practices, guidelines, and important forms.

## GETTING INVOLVED IN BERKELEY'S GLOBAL COMMUNITY

Volunteers are important partners in keeping Berkeley's international family connected to the university. We invite you to consider becoming a regional contact or a founding member or active volunteer of a Berkeley Club if you are interested in:

- Staying actively involved with Berkeley;
- Giving back to the university that shaped your education and life direction;
- Increasing the university's visibility in your community;
- Keeping up with current issues, trends, and events related to the campus and community; or
- Building and benefitting from your Berkeley network;

And you have:

- Enthusiasm;
- A willingness and time to initiate and sustain activities;
- The ability to motivate and engage alumni;
- The ability to communicate and collaborate effectively with a diverse group of people; or
- An interest in cultivating new skills.

Regional contacts are alumni volunteers designated by International Relations to serve as ambassadors and points of contact for fellow alumni, parents, current and prospective students, staff, faculty, and other constituents in their geographical region or city. While regional contacts are not required to plan any activities or events, they are welcome to do so on an informal, casual basis. Regional contacts must sign the volunteer agreement, found on p. 21, and file it with International Relations.

In areas with a higher concentration of alumni, founding and/or leading a Berkeley Club may be a more attractive volunteer option. Berkeley Clubs are officially recognized regional alumni constituency groups sponsored by International Relations, offering opportunities to socialize, learn, network, and celebrate their connection to Berkeley. They receive more tools and support and have greater expectations and responsibilities. International Relations will help you assess the viability of starting a Berkeley Club in your area and, if deemed appropriate, guide you through the process of establishing and maintaining an official group. It is important to understand that it may not be feasible or justified to start a group in some areas, particularly where the local alumni population is fewer than 50 people.

To become a regional contact or to start a Berkeley Club, please contact Florence Gaberell-Julien, associate director of International Relations, at [fgjulien@berkeley.edu](mailto:fgjulien@berkeley.edu) or +1.510.642.9239.

## **BERKELEY CLUB REQUIREMENTS**

Berkeley Clubs are defined by the University of California Regents as “constituency alumni groups” and may not operate without receiving proper authorization by the chancellor or his designee, the Office of International Relations. While each Berkeley Club is unique, they must meet the following requirements in order to obtain and maintain official status:

1. Follow the naming convention of “Berkeley Club of [city or region].” Regional designation is dependent on your location and determination by International Relations.
2. Welcome all Berkeley alumni, attendees, and friends to participate in the club’s programs and events.
3. Maintain an active leadership committee of at least three elected or appointed officers on an ongoing, transparent basis. The club president must be a Berkeley alumna/us, and all other officers must either be alumni or have attended Berkeley for at least one semester. International Relations must approve all club officers, and each one must submit a signed volunteer agreement, found on p. 21, to International Relations.
4. Adopt bylaws, a constitution, or other governing documents approved by International Relations that contain a broader, more detailed overview of the club’s rules and operation. See pp. 23–24 for sample bylaws.
5. Comply with all relevant university policies and guidelines, as well as requests from official university departments. This includes, but is not limited to, the use of the Berkeley name and trademark (**bcbp.berkeley.edu**), UC Regents Policy 5203, and policies and administrative guidelines for constituency alumni groups (**ucop.edu**), branding (**brand.berkeley.edu**), and this Berkeley Clubs Volunteer Handbook.
6. Adhere to the university’s cash handling and financial reporting procedures, and submit an annual recognition compliance questionnaire, found on pp. 25–26.
7. Register with the club’s home country or local government if required, and comply with all laws, rules, and regulations.
8. Use the contact information, tools, and other resources provided by International Relations for alumni club purposes and promotion only, and honor all privacy requests. Use of these resources for commercial or political gain is strictly forbidden. All club officers must sign a confidentiality statement, available on p. 22, before accessing alumni data.
9. Organize at least three events per year to connect with each other and the university.
10. Alert International Relations before contacting Berkeley faculty members or senior administrators about potential club events, and include the department in all communications.

## HELPFUL TIPS FOR STARTING A BERKELEY CLUB

1. Recruit leadership committee members:  
While you must only have three alumni committed to leading the club, more volunteers will increase the likelihood of your club being successful. See the Leadership Committee section on pp. 9–11 for a breakdown of roles.
2. Set up a club kickoff meeting:
  - Determine leadership roles and responsibilities, outlined on pp. 10–11.
  - Define the club's purpose, goals, and guidelines. Reference the bylaws template on pp. 23–24.
  - Set up a calendar of leadership committee meetings.
  - Review the communication tools available to you, found on pp. 13–16.
3. Plan your first events:
  - Start small with simple events or activities that are easy to plan.
  - Aim for at least two events during the first year in order to build a solid foundation and keep alumni engaged.
  - Ask International Relations for guidance on event planning.
4. Grow and plan ahead:
  - Recruit new volunteers to maintain the club's vitality and growth.
  - Ask past attendees for suggestions and/or send alumni surveys to gauge their programming interests and solicit feedback.

## PROVISIONARY PERIOD

All new international alumni groups go through a one-year provisional period before being formally recognized as a Berkeley Club. In order to ensure that your group receives formal status, you must complete the following during this time:

1. Develop bylaws with the assistance of International Relations.
2. Hold at least four leadership committee meetings, with a minimum of two in-person meetings in which a majority of the officers are present.
3. Maintain regular communication with alumni to invite them to join your group.
4. Organize at least two events, with the aim of building your membership.
5. Maintain an active, updated website; Facebook group; or other online presence.

Once the group is up and running, we ask that you do the following during year two:

1. Plan a minimum of three activities.
2. Maintain at least half of the original club officers on your leadership committee.
3. Implement the bylaws.

## RESOURCES

International Relations is pleased to offer these foundational tools. Please check with the department for specific resources available to your club.

### LEADERSHIP SUPPORT

- This Berkeley Clubs Volunteer Handbook
- Volunteer support
- Advisory support, including quarterly check-ins with the leadership committee by email, phone, or in person
- Data on local alumni

### COMMUNICATION, MARKETING, AND EVENT SUPPORT

- Club website
- Broadcast email tool (Salesforce Marketing Cloud)
- Online event registration form tool (Wufoo)
- Online survey tool (SurveyMonkey)
- Assistance with planning events and recruiting volunteers
- Support with facilitating and coordinating faculty and staff speakers
- Help promoting events via email blasts, the International Relations website and Facebook page, and/or official university e-publications
- Event collateral, such as Big Game downloads, university literature, balloons, coasters, pom-poms, and pennants
- Customized logos and email banner as well as business card, letterhead, and nametag templates
- One hanging banner

## **LEADERSHIP COMMITTEE**

While the number and role of officers on the leadership committee will depend on the size and scope of each club, a minimum of three officers is required. Having enough volunteers to distribute the work is key to the club's success and your own enjoyment. We encourage recruiting a diverse group of officers that represents the alumni in your area. You may also choose to create an honorary/advisory committee — often composed of senior alumni who are well-respected in the community — to provide additional support. Please note that, as volunteer-based organizations, clubs are not allowed to employ paid staff.

## **SUCCESSION PLANNING**

To keep a vibrant, engaged, and healthy alumni club, officers need to transition into and out of leadership roles, preventing burnout and assuring a fresh perspective on the club's vision and events. We recommend that you set a term limit of one or two years per position (renewable once) and create a succession plan that outlines how to identify, recruit, and train new officers to ensure a seamless transition and the longevity of the club. Make sure you define your officer structure, roles/responsibilities, term limits, and succession in your bylaws.

## **MEETINGS**

The leadership committee is required to meet at least once per quarter, with a minimum of two in-person meetings per year in which the majority of officers are present. The club should also schedule an Annual General Meeting (AGM) to ensure transparency and give all members the opportunity to receive information on past and future activities, ask questions, and provide feedback. Announce all meetings and share the agendas in advance. Maintain minutes or similar records that give participants the opportunity to comment.

## **DEALING WITH DIFFICULT VOLUNTEERS AND DISAGREEMENTS**

We ask that club leaders continuously strive to create an environment in which volunteers come together in a collaborative, friendly manner to share their passion and love for Berkeley. However, disagreements and misunderstandings do sometimes occur. As leaders, it is important to maintain neutrality so that the club's overall mission remains the primary goal as you work through issues, while carefully considering how you will handle each situation. International Relations is available to provide guidance.

Although email is a convenient form of communication, it can often be misinterpreted or escalate a situation, especially when emotions are running high. Instead, wait to discuss more contentious issues at your regularly scheduled leadership committee meetings. If time is of the essence, you might make a phone call instead.

If you are experiencing difficulties with a volunteer, consider these helpful tips:

- Set clear boundaries for discussions.
- Respect each other's time and feelings.
- Listen to the volunteer's specific concerns.

- Determine if retraining or one-on-one mentorship might solve the problem.
- Consider moving the volunteer to a new position that might be a better fit.
- If the volunteer seems burned out, assist them by reassigning tasks to other club officers.
- If you are concerned about someone's competence or conduct, ask International Relations to help you resolve it.

## **SAMPLE LEADERSHIP POSITIONS AND RESPONSIBILITIES**

(All positions can be shared by more than one person.):

### **PRESIDENT**

- Maintains regular contact with International Relations and acts as a liaison between the department and club.
- Provides strategic leadership, sets priorities, and delegates tasks.
- Ensures compliance with university guidelines and requirements.
- Takes overall responsibility for the club's activities.
- Manages club officers and convenes regular officer meetings.
- Oversees club's financial health and approval of budget.
- Submits annual report to International Relations.
- Leads efforts to recruit other volunteer leaders and identify possible successors.

### **VICE PRESIDENT**

- Supports the president in carrying out strategic oversight of the club, recruiting leaders, and identifying successors.
- Oversees many programming activities.
- Ideally serves as the next club president.

### **TREASURER**

- Oversees the approved budget and keeps records of all financial transactions, including expenditures, revenues, and reimbursements.
- Maintains bank account (if applicable) and submits accurate financial paperwork to International Relations in a timely manner.
- Works with the president and event chairs to ensure that events fall within the club's budget.
- Sets up and manages online registration software to collect event registration fees.

## SECRETARY

- Creates and circulates agendas and notes before and after each leadership committee meeting.
- Works with the president to submit an annual report to International Relations.

## EVENT CHAIR

- Plans and coordinates event logistics, including venue, catering, program flow, speakers, registration, set-up requirements, and nametags.
- Manages event volunteers.
- Serves as the contact person for the event.

## COMMUNICATIONS AND/OR SOCIAL MEDIA CHAIR

- Provides International Relations with content updates for the club's website.
- Drafts written communications such as invitations, announcements, and newsletters, and submits to International Relations for dissemination via broadcast email to club members.
- Maintains the club's social media platforms, such as Facebook and LinkedIn groups; regularly posts photos, event reminders, articles about Berkeley, etc. in order to increase connection to the university and promote the club's activities and membership.

## MEMBERSHIP CHAIR

- Generates ideas to recruit and retain new members.
- Promotes @Cal ([cal.berkeley.edu](https://cal.berkeley.edu)), Berkeley's online alumni network, and encourages alumni to join.
- Regularly updates International Relations on alumni contact information and submits accurate membership records on a yearly basis.
- Follows up on "Get Involved with our Club" forms submitted online through the club's website.

## YOUNG ALUMNI CHAIR

- Has graduated in the last 10 years.
- Welcomes new alumni to their communities and helps connect them to members.
- Plans networking events geared toward expanding the professional and personal networks of recent graduates.
- Organizes casual and affordable social events for local young alumni.
- Recruits young alumni to volunteer, such as staffing a new student reception.

## **FINANCE**

All Berkeley Clubs must be responsible for their own finances and operating budget. The university is unable to provide financial support to cover club expenditures and activities. In addition, club assets must be irrevocably dedicated to benefitting Berkeley. If a club is to dissolve, its assets must be transferred to the Berkeley Foundation.

### **BANK ACCOUNT**

While some clubs run no-cost events and programs, others may choose to set up a bank account to collect event fees and membership dues, pay vendors, and manage other transactions. After obtaining written permission from International Relations, each club may establish one checking account under the club's name (not an individual's name), not to exceed US\$10,000. Any amount over that must be transferred to the Berkeley Foundation, unless the club receives approval of a higher amount. You must also comply with the university's cash handling procedures, including cash receipting and depositing procedures, keeping a written record of authorized check signers, and obtaining two signatures on checks over US\$1,000.

Clubs with an external bank account must give designated Berkeley personnel access to their books and records for inspections and audits as well as pertinent information, records, or photocopies of transactions from the financial institution. In addition, you must submit copies of monthly account statements with the annual recognition compliance questionnaire, found on pp. 25–26.

### **MEMBERSHIP DUES**

While membership dues may help a club raise operating funds, most international clubs do not charge dues, a practice which International Relations strongly encourages. Membership dues can discourage alumni from joining or participating in activities as well as create additional work for volunteers in charge of membership and accounting.

If a club decides to collect dues, we recommend limiting it to a reasonable amount and offering a discount for alumni who graduated within the past five years. Paid members should receive incentives for supporting the club, such as preferred event pricing, priority registration, and voting rights (if applicable). However, nonpaying members should not be excluded from participating in general club activities.

## **COMMUNICATIONS, MARKETING, AND DESIGN**

To maintain high standards of professionalism and customer service, we ask that you respond to inquiries in a timely manner, particularly from current and prospective members. Please remember that mailing lists and online tools such as your club's webpage or social media outlets must be used for club purposes only. Commercial or political announcements are strictly prohibited.

### **WEBSITE**

Berkeley provides each Berkeley Club with a hosted website maintained by International Relations. To ensure that your website contains current information, please submit any content updates promptly for implementation.

Your Berkeley-hosted website provides the following benefits:

- Consistent and official branding;
- Great visual design;
- Easy to navigate;
- Automatically lists your club's events on International Relations events website;
- Customizable to your club's needs and enables you to post event and meeting notes, add photos and graphics, link to your social media pages and groups, list your club's mission, programs, officers, and contact information, provide resources for local alumni and other constituents, and upload documents.

Note: International Relations no longer allows Berkeley Clubs to use third-party websites.

### **SOCIAL MEDIA**

Social media refers to different online platforms that allow people to create, share, and/or exchange information and ideas in virtual communities and networks. Given social media's ubiquity and its global and instant reach, we encourage alumni clubs to maintain a consistent presence on various platforms, particularly Facebook and LinkedIn, as appropriate. Their success depends on frequent and dynamic posts; otherwise they become stale or obsolete. Please note, however, that social media is intended to supplement, not replace, traditional means of communication.

#### **FACEBOOK**

Once seen as a place for youth to connect online, people of all ages now look to Facebook for resources and communities to join. Setting up a Facebook group is a great way to engage current members in dialog, attract new members, promote events, poll members, share Berkeley news, and post resources, photos, or videos.

For consistency, your Facebook group (or page) should be named after your club, e.g. Berkeley Club of Hong Kong. Make sure to feature a brief description that highlights the purpose of your group and includes a link to your website. Additionally, we suggest the following group settings:

- Group type: club
- Privacy setting: private
- Membership approval: “Any member can add members, but an admin must approve them”
- Friendly link: [www.facebook.com/groups/BerkeleyClub\[location\]](http://www.facebook.com/groups/BerkeleyClub[location])
- Tags: University of California, Berkeley
- Posting permissions: “Members & Admins can post to the group”; if you prefer additional control, you can select “post approval” to have all group posts require administrator approval.

Clubs with an existing Facebook group should provide International Relations with administrator access; this allows us to help manage as needed and ensures the sustainability of the group in the event of any club leadership transition.

Clubs that would like to start a group should contact International Relations; we will work with you to set up your group.

We highly recommend that you like “Berkeley – Office of International Relations,” “Cal Alumni Association – Berkeley,” and “Berkeley” to stay up on the latest campus news, photos, and other items that you might want to share on your own page.

## LINKEDIN

LinkedIn is a networking site designed specifically to connect the world’s professionals. We suggest that you create a group for your club that enables you to determine who can join, provides a space for members to network with other Berkeley alumni in the region, and gives discussions more visibility. As the group manager, we recommend that you start and contribute to discussions, empower and engage members, diligently manage memberships, and monitor the group’s activity to protect from spam and marketing. Alternately, you can invite your members to join the “Berkeley Clubs International Alumni Network” LinkedIn group to your members. The “Berkeley Clubs International Alumni Network” is a platform where Berkeley alumni, visiting scholars, staff, faculty, and current students can connect with one another, share employment and internship opportunities, and engage in discussions related to career and professional development, the university, and other related topics.

## @CAL

@cal ([cal.berkeley.edu](http://cal.berkeley.edu)), Berkeley’s online network of thousands of alumni, offers these exciting services:

- Free [berkeley.edu](http://berkeley.edu) email address available to all alumni.

- The ability to search for alumni by name, graduation year, employer, city, and more.
- The ability to create your own free public profile for which you can choose a custom background and URL, and add it to your résumé, email signature, and social media profiles.

## WECHAT

In some locations, particularly China, WeChat — a free instant messaging and social network application — is now one of the most commonly used communication platforms.

WeChat public accounts serve as an efficient broadcast tool for clubs to promote their activities and share information with their members. This option offers one-way communication, so members have to subscribe to the public account to receive messages. Please note that subscribers can send private messages to the account administrator but are not able to make public posts.

WeChat groups, similar to “chat rooms,” are a popular and effective way to communicate information as well as facilitate conversations and exchanges among members. They are ideal for animating small communities around interest groups like alumni clubs, and they usually have an engaged following and high visibility.

Should you decide to use this application as a way to enhance alumni communication with and among your club members, we ask that, for consistency, you name your WeChat public account and/or group after your club (e.g. Berkeley Club of Shanghai). WeChat should only be used to share club announcements and relevant Berkeley-related news, information, photos, or videos, including invitations to alumni events, networking opportunities, and resources. When setting up a public account, select “subscription account,” then be sure to create a customized message to welcome new subscribers that includes a link to your club’s website and contact information. For groups, please ensure that your members’ messages stay relevant to the group and remain respectful and appropriate at all times.

## EMAIL

As of 2018, all email blasts, including event invitations, announcements, and newsletters, must be sent by International Relations using Salesforce Marketing Cloud, the university’s broadcast email tool. Volunteers should not use alternate platforms to broadly email constituents.

Clubs should submit email drafts to International Relations at least five business days before the desired “send date” to allow enough time for a staff member to review, provide editorial and design feedback, and approve the final draft for distribution.

International Relations will create and manage your club’s distribution list for Salesforce Marketing Cloud, so please make sure to promptly submit any updates, such as new members or change of email address. In addition, International Relations will refresh your club’s email list annually (every September) to include new graduates.

Finally, in lieu of using volunteers' personal email address for club-related matters, your club should have a generic email address (e.g., [berkeleyclub\[region\]@gmail.com](mailto:berkeleyclub[region]@gmail.com)), which will be listed on your website and on our international alumni network page as the primary contact for all queries.

## DESIGN

International Relations will provide you with customized logos, an email banner, and a hanging banner. Logos are available as small, square-shaped .png files (180 pixels, especially good for Facebook), as well as EPS files for use on your club's website, stationery, business cards, and other collateral. You may not alter your logo in any way or combine it with any other image to create a new logo.

## FONTS

Open Sans — A free Google font downloadable at [fontsquirrel.com/fonts/open-sans](https://fontsquirrel.com/fonts/open-sans).

Georgia — Available on most computers as part of Microsoft Office.

## COLORS

Berkeley Blue – Pantone 282

Founder's Rock – Pantone 5405

Medalist Pantone 7550

CA Gold Pantone 1235

More information on fonts, colors, brand styles, and downloads is available at [brand.berkeley.edu](http://brand.berkeley.edu). Please note that the university logo and seal are strictly reserved for official business and may not be used on club collateral. Visit [bcbp.berkeley.edu](http://bcbp.berkeley.edu) for details.



## EVENTS

### EVENT PLANNING TIPS

Successful events require careful planning and organization. We ask that you strive to plan regular events (at least three per year) that serve a variety of constituents and cover a variety of purposes — such as networking, educational, social, cultural, community service, or events for families with children. In addition, we encourage you to host at least one parent and/or student event each year. Finally, for strategic planning and membership, we ask that each club keep records of attendees whenever possible and share them with International Relations upon request.

1. Create an event plan:
  - What is your goal? How will you define success?
  - Who is your target audience? What do you want them to get out of it?
  - What is your budget?
  - How much time and how many volunteers do you need?
  - What program elements do you need (e.g. location, catering, a/v, speaker, entertainment)?
2. Identify dates early, particularly for annual events like a holiday dinner, Big Game party, or family picnic. Stick to the same date and time, such as the second Thursday of every month, for recurring gatherings like happy hours and networking lunches.
3. Aim for simplicity so that the events are easy to execute and, most important of all, break even. We recommend using a “pay as you go” plan, such as a cash bar or charging a ticket fee to help cover the costs. Keep prices affordable and include discounts for current students or alumni who graduated within the past five years whenever possible.
4. Try to find a local company, restaurant, hotel, or university that will donate event space. Ask your members for complimentary venue suggestions, such as an office or private home. Establish partnerships with other alumni clubs and co-host events that will help build your audience and allow you to share the costs.
5. Publicize your events no less than three to four weeks in advance — six to eight weeks for signature events. Send a save-the-date postcard or email followed by an invitation with complete details, and a final reminder as the registration deadline approaches. Make sure all of your messages — email, print, and/or online — are clear and consistent.

### PROMOTING YOUR EVENT

International Relations will email event invitations to the Berkeley community in your region, advertise your events on our own website as well as your webpage, and in the Berkeley Online international e-newsletter when applicable. We strongly encourage you, however, to promote your own events through social media platforms and personal outreach for maximum visibility and participation.

## EVENT TYPES

### SOCIALIZING

- Happy hour
- Mixer with other U.S. or local university alumni clubs
- Summer picnic or BBQ
- Group dinner at a restaurant or private home
- Wine tasting
- Holiday banquet
- New Year's Eve cocktail party

### PROFESSIONAL OR EDUCATIONAL DEVELOPMENT

Featuring faculty, famous alumnus/a, or industry leaders\*

- Speaker series
- Panel discussion
- Brown bag lunch lecture
- Networking lunch or reception

### CULTURAL PURSUITS

- Theater or movie outing
- Concert
- Art fair
- Guided tour of local landmarks or museums

### ATHLETIC EVENTS OR RECREATIONAL FUN

- Football or basketball game viewing parties
- Outdoor activities, such as a ski weekend, golf tournament, or hiking
- Sports leagues (basketball or flag football)

\* In order to ensure a smooth and successful event, please check in with International Relations before confirming all guest speakers' participation (at the onset of your planning stages) to establish whether or not your event warrants any special consideration or handling, and/or if specific university guidelines and/or procedures apply.

## PARENT/STUDENT ENGAGEMENT\*\*

- Summer send-off receptions for new students and their families
- Alumni and student mixers
- Job shadowing or mentoring

## SPONSORED EVENTS

Depending on the nature of your event, there may be opportunities for a club to secure event sponsors. This may include in-kind donations of goods or services and/or monetary support such as table sponsorships.

The club must bring any sponsor opportunity to the attention of the Office of International Relations (IR) before committing to a possible sponsor. Upon sponsor approval, IR will provide applicable guidelines and resources (e.g. letter templates, examples of sponsorship levels) to the club to facilitate sponsor solicitation and recognition. The university may deny a company's sponsorship request if such sponsorship or the proposed sponsorship activities violate applicable laws or university policies or if the association with a particular partner is inappropriate or would negatively impact the university's reputation.

Finally, please note that sponsor-provided monetary or in-kind donations to alumni clubs to offset the cost of events are not considered tax-deductible contributions to the university. In addition, the university cannot accept monies or in-kind donations on behalf of an alumni club for the club's use.

## POLITICAL AND RELIGIOUS EVENTS

Pursuant to University policies, the campus may not sponsor political or religious activities, except when authorized for university purposes by the Regents or the President or their designees.

## FUNDRAISING ACTIVITIES

While we appreciate a club's interest in fundraising on behalf of Berkeley, we encourage and prefer that alumni consider making yearly individual gifts directly to the campus instead — the easiest and most effective way to support your alma mater.

Should you choose to host a fundraiser, we ask that you consult with International Relations before initiating the process in order to receive guidance and ensure that it meets the university's official protocols for event planning and management. Please keep in mind that when an alumni club donates its event proceeds to Berkeley, the university can only acknowledge the club as a whole for the donation. Individuals who contributed to the event will not receive an official gift receipt from Berkeley.

\*\* Please contact (the office of) international Relations for guidance and support for student- and/or parent-focused events and programs; these activities must be coordinated through campus (International Relations or the university).

In addition, Berkeley Clubs may not formally accept gifts of any kind on behalf of the university. Such gifts should be made directly to the Berkeley Foundation or through The University of California Foundation Limited in Hong Kong, The University of California Trust (UK), or Transnational Giving Europe (TGE) partners in select European countries.

**APPENDIX: VOLUNTEER AGREEMENT**

Volunteers are dedicated alumni, parents, and friends who have been invited to serve as advocates and ambassadors for the university. Volunteers make a significant impact in supporting UC Berkeley by engaging alumni, parents, students, and friends through activities, programs, events, and one-on-one outreach. In your role as a volunteer, we require that you:

- Adhere to all relevant university policies and guidelines.
- Act in the best interest of the university and align with its mission.
- Secure all sensitive information, including alumni data, at all times. (Please refer to the confidentiality statement for more information.)
- Alert International Relations immediately when personal and/or professional conflicts of interest prevent you from volunteering. You may not use your role as a volunteer for personal or commercial gain.
- Identify yourself as a volunteer, not as an employee or official representative of Berkeley, when engaging with third parties, including media outlets, universities, companies, and others.
- Maintain positive and constructive verbal and written communications with alumni, parents, students, campus staff, and other community members. Direct questions that are beyond your expertise to campus staff.
- Remain respectful and considerate at all times when interacting with other volunteers, alumni, parents, students, campus staff, and other constituents.
- Foster a collaborative and supportive environment among all volunteers.

Please note that the university reserves the right to disengage with any volunteer, at any time, who does not adhere to these requirements or whose actions are deemed inappropriate for or not aligned with the mission, goals, and regulations of the university.

I, the undersigned, have read and understood the content of the volunteer agreement above and promise to abide by its stipulation.

Printed volunteer name \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

**APPENDIX: CONFIDENTIALITY STATEMENT**

For non-staff alumni groups and clubs, affinity groups, student groups, regional and class representatives, and volunteers whose activities include the permitted use of advancement data.

Alumni groups/clubs, student groups, and volunteers are important partners and play a vital role keeping alumni connected to UC Berkeley. They often request advancement data — confidential personal data about alumni, donors, and friends of the university — in order to support their communication and engagement efforts. When permitted by the university, these groups may use advancement data for specific purposes.

Irrespective of the means by which data is provided, all individuals accessing advancement data must agree to protect the privacy and security of the data and abide by the following terms:

1. I agree to use the data only for its intended purpose and not for any secondary purpose.
2. I agree to keep the data confidential and will not share it with anyone, including any third-party entities or businesses. I understand that to do so is in strict violation of UC Berkeley’s data stewardship policies.
3. I agree to refrain from copying the data to my computer. If I must do so, I agree to protect the data from unauthorized access and will delete the information as soon as the project for which the data was intended is complete, including shredding any paper copies.
4. If I have any questions regarding appropriate use, sharing, and protection of advancement data, I will contact my primary staff liaison or the director of advancement information management in University Relations at [ursa@berkeley.edu](mailto:ursa@berkeley.edu).

I have read and agree to abide by the privacy guidelines as stated above.

---

Signed	Date
Name (please print) _____	_____
Organization or Project _____	_____
Affiliated Campus Organization _____	_____
Primary Campus Contact _____	_____
E-mail Address _____	_____

## **APPENDIX: BYLAWS**

Bylaws provide structure and purpose and are required in order for a club to be recognized as a constituency alumni group sponsored by International Relations. Below are samples that you can use in crafting your club's bylaws, or you may visit [bylawsreview.com](http://bylawsreview.com) for ideas.

### **ARTICLE I: NAME**

The name of this organization is the Berkeley Club of \_\_\_\_\_ (city or region as determined by International Relations) ("the club"), a constituency alumni group of the University of California, Berkeley.

### **ARTICLE II: PURPOSE/MISSION**

To promote and support the advancement of the University of California, Berkeley ("the university") by regularly engaging its alumni and friends, fostering a strong lifelong connection to each other and the university, and inspiring goodwill and support.

### **ARTICLE III: GOVERNANCE/OFFICERS OF THE CLUB**

The club shall have a leadership committee consisting of at least three duly elected or appointed officers. All club officers must be members in good standing and be approved by the Office of International Relations. The club president must be a UC Berkeley alumnus/a.

Insert the title, duties, and responsibilities of each officer.

Insert how the officers will be elected/appointed.

The officers will be elected by members at the annual general meeting by a majority vote.

The term of office shall be (insert time. We recommend a one-to-two-year term maximum). Officers shall serve no more than two consecutive terms in any office.

The administrative head of the Office of International Relations shall serve as an ex officio member of the governing board and of any executive or similar committee empowered to act for the governing board.

### **ARTICLE IV: VOTING**

How does your club make decisions? Many organizations require a simple majority.

### **ARTICLE V: MEMBERSHIP**

All UC Berkeley alumni are eligible to join your club.

We also ask that you create an “associate member” level that is open to visiting scholars, attendees who have spent at least one semester at Berkeley, and friends (those who have shown sufficient interest in Berkeley). These members do not have voting privileges and are not required to attend most meetings. Associate memberships are a good way to engage the extended Berkeley community.

#### **ARTICLE VI: MEETINGS**

Insert information about the frequency of your leadership committee meetings (at least once per quarter, with a minimum of two in-person meetings per year) and how they are called and noticed. Include information about the annual general meeting (AGM), such as date and how/when the meeting will be announced to club members.

#### **ARTICLE VII: DUES (OPTIONAL)**

Each member of the club will be assessed dues of \$\_\_\_\_\_ each year. The club’s leadership committee shall determine the amount.

#### **ARTICLE VIII: DISTRIBUTION OF ASSETS**

In the event of dissolution, the club’s assets shall be distributed to the UC Berkeley Foundation.

#### **ARTICLE IX: AMENDMENTS**

These bylaws may be amended by a two-thirds vote of the club membership present at any meeting. Any change must be submitted in writing to the Office of International Relations for approval.

#### **SIGNATURES/DATES**

Date of approval and signatures of the president, secretary, and other key officers of the club.

**APPENDIX: ANNUAL RECOGNITION COMPLIANCE QUESTIONNAIRE**

To receive continued official recognition, a constituency alumni group shall submit the following information to the Office of International Relations by February 15 of every year. You can request an alternate date based on your club’s fiscal year.

- 1. List all current officers and their roles. Include the group’s principal contact person in row one:

First and Last Name	Email Address	Role/Position
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		
12.		
13.		
14.		
15.		

- 2. Have your organization’s structure, purpose, goals, and/or enabling documents changed?

- No
- Yes (Please provide supporting documents.)

3. Do you have an external bank account?  
 No  
 Yes (Please provide a statement of revenues, expenses, and net income for the last fiscal year, as well as a copy of the monthly bank statements.)
4. Using the events calendar form on the next page, provide a list of your club's activities for the past year (12 months) including date, title, brief description, speaker name(s) as applicable, location, number of attendees, and how the event was paid for (e.g., no-host, sponsorship, participation fee).
5. Provide your club's annual plan and proposed calendar of activities for the upcoming year, including how the club will financially support these activities (e.g., no-host, sponsorship, participation fee).
6. Signed statement:

The leadership committee (or governing body) of organization's name

\_\_\_\_\_

has read the University's Policy and Administrative Guidelines for Campus Alumni Association and Constituency Alumni Groups and has formally voted that it will comply with the terms of that document.

Name of authorized representative (please print) \_\_\_\_\_

Signature \_\_\_\_\_

Title \_\_\_\_\_ Date \_\_\_\_\_





Writer — Florence Gaberell-Julien

Editor — David Peterkofsky

Designer — Vee Mahoney

Office of International Relations

University of California, Berkeley

1995 University Avenue, Suite 401

Berkeley, CA 94704-1058

[intl@berkeley.edu](mailto:intl@berkeley.edu)

Tel: +1 510.642.9239

Fax: +1 510.643.2007

