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FREDERICTON



UPPER OTTAWA VALLEY

ALUMNI ASSOCIATION CHAPTER HANDBOOK



ST. FRANCIS XAVIER
UNIVERSITY

StFX Alumni Association Mission Statement

To foster connections between alumni and with the University.

Our alumni never truly leave StFX.

*When they graduate, they take with them
the Xaverian values that have shaped their time here -
a passion for social justice, a global outlook
and a shared sense of community.*

St. Francis Xavier University (StFX) has been educating the hearts and minds of students from across Canada, the United States and the world since 1853. The entire StFX experience, from the small class sizes to residence life to service learning to the community-based atmosphere, creates incredible spirit, pride and life-long friendships among its students, which have led to arguably one of the most loyal groups of alumni in North America, according to independent polling. We acknowledge that our alma mater StFX, situated in the rolling hills of Antigonish, is in Mi'kma'ki, the ancestral and unceded territory of the Mi'kmaq People. This territory is covered by the "Treaties of Peace and Friendship" which Mi'kmaq and Wolastoqiyik (Maliseet) Peoples first signed with the British Crown in 1725. StFX boasts one of Canada's most idyllic campuses and continues to hold academics to a high standard while introducing new programs, all the while reinvigorating the community with state of the art capital projects, such as Mulroney Hall, the Rankin School of Nursing, and the Amelia Saputo Centre, to name a few. MacLean's magazine has consistently ranked StFX in the top spots for best reputation in Canada in its university issues. The Xaverian spirit and values have had a tremendous impact on our graduates and the communities in which they live after leaving StFX, and alumni play a large part in this success. Because of all of these aspects, the StFX experience, reputation, and pride are as strong as ever.

Alumni are the lifeblood of StFX. For generations, support has come in the form of helping to recruit new students, through donations large and small, and with the time, talent and comradery our alumni bring to their individual communities. Alumni support has been instrumental in funding student scholarships and bursaries, campus renewal and major infrastructure projects, year after year. The StFX Alumni Association in particular has supported these efforts in various ways and contributed to the following projects on campus most recently:

- **Scholarships & Bursaries**
- **StFX Day of Giving Campaign**
- **Alumni Plaza**
- **StFX National Dinner**

In this handbook, you will learn about the structure and function of the StFX Alumni Association, the role it plays with local chapters, the expectations of these chapters and their leadership teams, as well as best practices for operating successful, engaging StFX Alumni Chapters across Canada and the world. The goal of this handbook is to ensure all chapters are sharing the same mission and values of the StFX Alumni Association while maintaining clear lines of communication with each other and the Alumni Affairs Office. Chapters can rely on these supports as they continue to grow strong and enduring relationships in their local communities, no matter how far away from Antigonish they may find themselves.

HISTORY OF THE STFX ALUMNI ASSOCIATION, AND ITS ROLE TODAY

The StFX Alumni Association was established in 1893 and officially established in 1908 by an Act of the Nova Scotia Legislature to promote the University to the outside world and to ensure that the school continued to thrive as a key player in post-secondary education. It is one of the most engaged and well-connected Alumni Associations in Canada. The Association represents the interests of alumni to StFX, and encourages and assists with alumni engagement in Canada and around the world. The Association is governed by a volunteer Alumni Council, which acts in an advisory role to the University on alumni affairs and appoints individuals to alumni seats on the University's Board of Governors.

Today, there are more than 52,000 StFX alumni around the world. The Alumni Affairs Office and StFX Alumni Association Council work diligently to maintain ties with all alumni and chapters, wherever they may find themselves after graduating.

WHO IS CONSIDERED A MEMBER OF THE STFX ALUMNI FAMILY?

Any graduate of StFX, the Coady Institute, or Mount Saint Bernard College, or any person that has completed a minimum of two (2) years at StFX, is considered part of the StFX alumni network.

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GOVERNANCE

The StFX Alumni Association is governed by a Constitution, which sets out the purpose, mandate, goals, membership and governance requirements for the Association. The aims and objectives of the Association are:

- To provide the best possible opportunities for alumni to connect with each other and with the University.
- To promote and maintain a positive and informed awareness of the University, its activities, its programs and its accomplishments.
- To advance and promote the best interests of the University through the ongoing support of its priorities and values.
- To be the voice of alumni and provide counsel to the University.
- To enable alumni to serve their communities making a positive difference as responsible StFX citizens of a global world.
- To add value to the lives of alumni through lifelong learning and meaningful services.

The Association is committed to the following guiding values:

RELATIONSHIP: In all we do, we will value the personal relationships among and between alumni, students, faculty, staff and friends for which StFX is renown.

COMMUNITY: We will build a strong sense of community among StFX alumni and encourage and support active involvement in the betterment of both the alumni and University communities.

INCLUSIVITY: Reflecting the University's heritage, values and traditions we will always respect, encourage, and include the diversity of the broader StFX community.

SERVICE: We will be dedicated to serving our alumni needs and interests and encouraging their active citizenship in service of the University and within their own communities.

LEADERSHIP: We will lead by example, striving for the best practices and building leadership opportunities for our alumni.

EXCELLENCE: Aligning with the University's values, we will set high standards and focus on the continued improvement of our programs in support of alumni and the University.

The StFX Alumni Association Executive Committee is comprised of all Officers of the Association, which includes the following roles:

- President
- Vice President
- Secretary
- Treasurer
- Past President

The StFX Alumni Association Bylaws currently outline the following committees, which are comprised of members from the Alumni Council, in addition to a select few past members of the Council:

- Executive (mentioned above)
- Nomination and Governance
- Chapter Development
- Enrolment Advisory
- Advancement Advisory
- Alumni Recognition
- Scholarship Selection
- Four regional committees (Atlantic Canada, Central Canada, Western Canada and International)

For further information on the role of the StFX Alumni Association including responsibilities and committee mandates, please refer to the Constitution and Bylaws on the StFX alumni website, and Appendix A & B, respectively.

PURPOSE AND OBJECTIVE OF AN ALUMNI CHAPTER

1. Provide the opportunity for StFX alumni to reconnect with friends old and new from StFX
2. Host social events that are inclusive, fun and safe for all StFX Alumni, friends and family of StFX alumni
3. Assist in hosting social events for current and prospective StFX students and their families
(e.g., Information Sessions with Student Success Leaders)
4. Share StFX news and updates with your chapter members
5. Encourage alumni participation in StFX events in local communities
(e.g., attending regional away games for varsity athletics)
6. Establish new chapters and strengthen existing chapters to increase alumni involvement, with the support of the regional committees

StFX alumni have a considerable impact on the university and enhancing local chapters will further improve and strengthen StFX, benefitting students and alumni for years to come.

ORGANIZING A STFX ALUMNI CHAPTER

It is important to note:

1. There are no dues or membership fees for StFX Alumni Association Chapters
2. StFX Alumni Chapters can be established in any community worldwide
3. All StFX Alumni Chapter presidents must report to the StFX Alumni Association prior to establishment
4. All StFX Alumni Chapter presidents will be asked to report to a regional committee on a semi-regular basis to provide updates and be updated themselves on latest news and events from StFX

1. CONTACT THE STFX ALUMNI OFFICE

1. Receive start up information
2. Get advice, support and the tools required
3. Receive a list of alumni in your geographical area
4. Receive a copy of the Chapter Handbook
5. Receive a contact list of other chapters

2. SELECT KEY ALUMNI TO ASSIST

Focus on bringing in individuals who are energetic, hardworking and understand the requirements of the role(s) – this is critical. It is this volunteer team who will be crucial to the success of your chapter.

3. CARRY OUT AN E-MAIL AND/OR PHONE BLITZ

Give all alumni in your geographical area the opportunity to join the chapter and continue to be a part of the StFX family.

4. CREATE ACTIVE RESPONSIBILITIES FOR YOUR MEMBERS

Everyone wants to feel that their participation has worth and that they can contribute to the success of the chapter.

5. PROVIDE FEEDBACK TO THE UNIVERSITY

The Alumni Association and Alumni Affairs Office ask for feedback in order to stay connected, hear any issues that may come up and best support your chapter. One way this feedback can be provided is through the regional committees, who report directly to the Alumni Council.

The StFX Alumni Association Code of Conduct / Policies and Procedures and Confidentiality Agreement documents can be found on the StFX alumni website. Please review these documents before taking over an existing chapter, or before considering starting a new chapter in your area.

Please see **Appendix C** and **D** for a copy of the Code of Conduct / Policies and Procedures and Confidentiality Agreement documents, respectively.



MANITOBA



ST. JOHN'S



EASTERN CAPE BRETON



OTTAWA



AHMERST/SACKVILLE



CALGARY



LONDON



FLORIDA



TORONTO



YUKON



TORONTO



ANTIGONISH/GUYSBOROUGH

LEADERSHIP

A solid chapter structure leads you to success. Find your champions and build your network. The following are suggested positions within a chapter team, but will often and are likely to vary depending on chapter size, location, etc.:

1. President or Co-Presidents
2. Event(s) Lead
3. Social Media / Communications Lead
4. Treasurer

It often takes more than one individual to create a successful chapter, and, without assistance, volunteer burnout can easily occur. For larger chapters, offer a support system for each position to create a succession plan within your chapter team. This will allow each position on your chapter executive team time to learn and for turnover to naturally occur with each position, while gaining the knowledge and the opportunity to volunteer in different capacities. Each chapter, no matter how small, should try not to operate as a one-person show. This is beneficial, as it will allow for the continuation of events and activities, even if one member of your team becomes suddenly unavailable.

Reaching out to new alumni will strengthen your chapter. Some ways to do this include:

- Send out congratulatory messages to seniors from your community upon receiving their X-ring
- Send out “welcome to the chapter” messages to new alumni or recent graduates in your area
- Send out emails and stay connected through social media to highlight major events and successes occurring at StFX. As an example, during the COVID-19 pandemic, this was a way to share with alumni StFX’s success in welcoming students back to campus, in addition to other “good news stories” and campus updates, while in-person chapter events were at a standstill.

The Alumni Association helps to coordinate activities for StFX alumni groups across the world. Alumni groups and chapters are as diverse as their geographical regions. Successful events are crucial to keeping alumni engaged and connected. A chapter will typically hold a minimum of two events per year, but this will vary by location and chapter. Each event should focus on the goal of bringing alumni together and building the community. Although not every event will appeal to all alumni, it is important to host a variety of events that are as inclusive as possible, and that share the mission of the Alumni Association. Some examples include:

- StFX Feast Day (December 3rd) celebrations
- StFX Homecoming events (e.g., watching a webcast at a local restaurant or pub)
- President’s receptions (organized in coordination with the Alumni Affairs Office)
- First year student send-off (current StFX students could be invited to meet and greet new and prospective students and their families, providing the opportunity to answer questions and share experiences)
- Alumni golf tournaments
- Pub nights
- Family BBQ or picnic
- Attend a local sporting event and get discounted or group tickets (e.g., Toronto Blue Jays game)
- Capitalize on local events as a group (e.g., Calgary Stampede)
- Community volunteer events (e.g., green-space clean up, volunteering as a group at a local homeless shelter or foodbank)

PLANNING A SUCCESSFUL EVENT

When planning an event, the Alumni Office can assist by providing the following:

- Event prizes
- Event graphics and promotion
- Online ticket sales
- Additional support and advice

When hosting an event, it is important to consider the following in the planning process:

- Is the event being planned / held in accordance with the rules of the third party establishment and any local laws? (e.g., public health rules / guidelines during the COVID-19 pandemic)
- Is this an all-ages / family event? Ensure communication is clear in this regard.
- Is the event accessible and inclusive?
- Does the event space require additional insurance, permits or licences?
- Does the event offer discounted prices (e.g., discounted tickets) for current students?
- Do you have a way of tracking who is attending your event and / or their preferred method of contact?

You should always give alumni the opportunity to “subscribe” or “unsubscribe” to chapter communication (e.g., emails). One suggestion would be to create a sign in table at your event to receive up to date contact information from alumni, preferred method(s) of contact, etc. Always remember to take pictures and document your event (with names and graduation years, if possible) for inclusion in the AlumniNews magazine. Remember - you should always receive an individual's permission before sharing photos.

Below is a brief checklist to consider when planning your event:

- ✓ Notify the Programs Coordinator in the StFX Alumni Affairs Office of your event via the StFX Alumni Chapter Event Request Form. This form can also be found at Appendix E.
- ✓ Establish an event lead from within your executive team
- ✓ Set a budget, and ensure the Alumni Affairs Office has approved it, if you have requested funds from them. If you are receiving funds from the Alumni Office to host your event, please complete and submit a Reimbursement Form, within two weeks of your event.
- ✓ Confirm date and location / venue for the event
- ✓ Ensure you send out an invitation to your entire chapter network (suggested 3 weeks in advance of event)
- ✓ Follow up the invitation with reminder emails, phone calls, etc.
- ✓ Advertise the event on social media (Facebook, Twitter, Instagram, LinkedIn, etc.)
- ✓ Have your StFX Alumni Chapter pop-banner (proudly!) displayed at the event
- ✓ Secure volunteers for the event (this is a great opportunity to have new members get involved and acquainted with the chapter!)

EVENT COMMUNICATION

The Alumni Office offers all chapters a complimentary StFX-tailored email address to maintain for your chapter (e.g., ottawachapter@stfx.ca). It is important to operate from a general account and not your personal email. Whether you use the StFX email (highly recommended) or another email address, you will be required to share this information with the Alumni Affairs Office so it can be shared on the StFX alumni website. Chapters are also encouraged to keep any website, social media pages, etc. up to date with contact information, events, etc. The Alumni Affairs Office and Alumni Association will also do its best to ensure contact and event information are posted to the university website alumni page.

Most chapters will communicate with their alumni through both email (e.g., Mail Chimp) and social media platforms. It is also important to encourage alumni to join these mailing lists and / or follow chapter social media accounts as a means to stay more connected to their chapters and the Alumni Association for news and information about upcoming events in their area. By diversifying your platforms of communication, you are more likely to reach a larger audience of alumni in your area and network.

Each chapter should contact the Alumni Affairs Office on a semi-regular basis to ensure that they have the most up-to-date contact lists. Due to privacy laws, the Alumni Association and StFX University can only provide contact information of alumni who have consented to have their information shared. Because of this restriction, it provides another reason to have the Alumni Affairs Office assist in promotional efforts for chapter events, by using their email lists and social media accounts.

If you are planning an event that requires a paid ticket, try to give your chapter as much advance notice as possible to purchase (suggested minimum of 3 weeks). Some ways you can advertise your event are:

- Email blast / phone tree
- Social media
- StFX Alumni Affairs Office assistance (website, social media and email blasts)
- Free advertising in local community bulletins, magazines or papers
- Local radio stations

Please see [Appendix F](#) for samples of email communication.

CHAPTER FINANCES AND REIMBURSEMENT POLICY

It is recommended that chapters set up a bank account as a non-profit organization and have it set up accordingly with a local financial institution. Each event or activity should be planned and self-supported by the individual chapter, and membership in a StFX Alumni Chapter should not be contingent on dues. The Alumni Affairs Office and Association will do its best to assist your chapter; however, financial independence for the effective operation of your chapter is highly encouraged. However, it should be highlighted that StFX Alumni Chapter volunteers are not expected to fund any chapter events out of their own pockets. To note, the Alumni Affairs Office will often cover smaller expenses (e.g., church basement rentals and/or light refreshments for a StFX Day reception) and will provide StFX items (e.g., StFX apparel) for chapters to use as raffle prizes at events.

It is important to note that all chapters must complete a Reimbursement Request form before making any purchases for an event. Upon approval, the Alumni Association will provide a limit or pre-set allowance for purchases. All receipts must be retained and submitted with a completed Expenses Form provided by the Alumni Association no later than two weeks following your event. Reimbursement will be provided in the form of a cheque, mailed to the individual or chapter once approved.

Some chapters operate a non-profit bank account to hold funds for bursaries or events. If your chapter is operating a bank account, it is important to familiarize yourself with requirements of the financial institution and ensure that any signing authority requirements are met.

All chapters operating bank accounts must provide details of the accounts and statements to the Alumni Association on an annual basis. This is to ensure that in an event of transition, the Alumni Association Treasurer can provide guidance or oversee the accounts in case there is a lapse of time with no chapter representation.

Chapters should operate their financial accounts in accordance with the Alumni Association Bylaws. Ultimately, each chapter is responsible for their own finances to use at their own discretion. If you believe or suspect that anyone within your chapter is using funds inappropriately, please contact the Alumni Association Treasurer or another member of the Executive Committee immediately.

Please refer to **Appendix G** for sample Reimbursement and Expense forms. Please note that StFX does not provide reimbursement for any alcohol or recreational substances.

STFX HOMECOMING

Homecoming weekend is traditionally held each year at StFX the weekend before Thanksgiving, in late September or early October. It is the largest alumni event hosted by the StFX Alumni Affairs Office. Each five-year class holds a dinner and / or event to celebrate on campus and alumni from those graduation years are invited to attend and participate in the weekend activities specific to their year. All other graduating classes are always welcome and encouraged to attend any Homecoming year to enjoy the festivities and re-connect with old friends and classmates. The Homecoming program offers an exciting and rewarding schedule of events for alumni and guests, while allowing alumni a chance to return to StFX to strengthen their connection with their alma mater and see first-hand the changes and improvements that take place on campus over time. For more information on StFX Homecoming, visit stfx.ca/alumni.

Homecoming is also the designated weekend for the StFX Alumni Association Annual General Meeting and other scheduled events (e.g., Hall of Honour and Sports Hall of Fame induction ceremonies). Depending on where your chapter is located, your regional committee chair will reach out to you prior to Homecoming and ask for an update on your chapter (e.g., review of past events, info on upcoming events). The Alumni Council also meets for one set of their in-person biannual meetings during Homecoming at StFX, with the other occurring in the spring, usually planned to coincide with the annual President's Gala. The spring set of meetings also provides the opportunity to bring chapter leadership together at StFX from one of the regions to participate alongside Alumni Council members.

StFX chapters are also encouraged to join in on the festivities by hosting Homecoming events in their local communities. Many chapters arrange an activity / event around the Homecoming game, which they can live stream to alumni and support / cheer on the X-Men and X-Women together as a local group.

ACCESSIBILITY AND INCLUSIVITY

All StFX chapter events, communication, and executive teams should be organized and conducted in such a way that is open and welcoming to all alumni of StFX, regardless of their race, ethnicity, religion, national origin, sexual orientation, gender identity and/or disability. Every event that is organized by StFX Alumni Chapters, no matter the size or stature, needs to be founded in accessibility and inclusivity to ensure that all alumni and friends of StFX feel welcome, safe and confident in attending any given event. The Alumni Association is committed to continuing their learning and efforts in this area.

INSURANCE AND LIABILITY

The StFX Alumni Association secured insurance for all chapter events as of October 2019. We value our volunteers and want them to feel secure when acting on the Association's behalf. Organizers of events could be held personally liable for acts or omissions in running events if certain rules are not followed. To ensure complete transparency, chapters must provide the Alumni Affairs Office advance notice and a brief description of their proposed event by completing the Event Request form. In response, the Alumni Affairs Office will provide the chapter with written approval in advance of the event. This process will provide chapter volunteers with a greater sense of security and protection in their event planning.

Please refer to **Appendix H** for a copy of the insurance policy, including limitations and exclusions. It should be understood that any insurance claims, or questions surrounding insurance claims, be directed first to the Alumni Affairs Office.

APPENDICES

To contact the Alumni Affairs Director to obtain the appendices below.

Shanna Hopkins

Director, Alumni Affairs

Email: shopkins@stfx.ca

- Appendix A** - Alumni Association Constitution
- Appendix B** - StFX Alumni Association Bylaws
- Appendix C** - Alumni Association Code of Conduct
- Appendix D** - Confidentiality Agreement
- Appendix E** - Application for Event Support.
- Appendix F** - I - Chapter Communication Sample (Chapter Event)
- Appendix F** - II - Chapter Communication Sample (Campus Update) (Sample 1)
- Appendix F** - II - Chapter Communication Sample (Campus Update) (Sample 2)
- Appendix F** - II - Chapter Communication Sample (Campus Update)
- Appendix G** - University General Expense Form
- Appendix H** - Insurance Policy
- Appendix I** - Chapter Contact Information (September 2021)



Alumni Association

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www.stfx.ca/alumni