



*A*LUMNI ASSOCIATION

**CONSTITUENT SOCIETY  
TASK FORCE**

**FINAL REPORT**

**NOVEMBER 2006**

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## **HISTORY / BACKGROUND:**

The Indiana University Alumni Association (IUAA) provides several ways for alumni and friends with similar interests to connect — through their schools and regional campuses (constituent societies), by where they call home (chapters), and through their special interests (affiliate groups).

Constituent societies have been organized to serve the needs of graduates of IU's various schools and regional campuses. In addition to keeping alumni informed about one another as well as developments within their schools and professions, constituent societies enhance and contribute to the excellence of the schools, campuses, and IU. Each member of the Alumni Association who has earned an IU degree is automatically a member of his or her school or campus constituent society.

Constituent societies began in the 1940s. The IUAA was one of the first alumni associations to begin a constituent society program, and has long been recognized as a leader in this area of alumni programming. The School of Dentistry Alumni Association and School of Business Alumni Association were the first constituent societies to organize. By 1950, seven alumni associations had been formed, and today the number has grown to 28.

Prior to 1974, alumni of a constituent society were asked to make a voluntary contribution to their respective society in addition to their IUAA membership dues. In 1974 the dues structure was changed, and the dues were unified. Membership in the IUAA included membership in one's constituent society, or societies in many cases. Membership in a constituent society was no longer voluntary. This change simplified the dues structure and eliminated the confusion caused by asking alumni to join multiple alumni organizations.

As part of restructuring the dues program, a dues allocation formula was developed to allocate funds on an annual basis to each of the societies, based on their paid membership figure. The formula has changed a few times since 1974, and currently the IUAA allocates \$1,000 to each society, plus \$6.25 per paid member.

Constituent societies range in size from the College of Arts and Sciences — which is the largest — with nearly 120,000 alumni and a membership of more than 20,000 to the School of Physical Education and Tourism Management — which is the smallest — with nearly 2,000 alumni and a membership of nearly 400 members.

The Trustees of Indiana University have designated the IUAA with the primary responsibility for all IU alumni relations programs. Each constituent society is assigned an

IUAA staff member to assist the society in coordinating its programs and activities. In addition, the IUAA provides many other services to support the societies. These services include membership promotion and renewal programs, editing and design services, financial services, assistance with electronic communications, and liability insurance. Many of the schools and campuses also provide financial and staff support for the societies.

The IUAA formed the Bloomington Alumni Professionals Forum and the Indianapolis Advancement Professionals Forum, each are comprised of staff members from the university schools and IUAA staff. The forums meet a few times each year to learn about IUAA updates and to discuss common issues and programs.

In November 2005, IUAA President and CEO Ken Beckley appointed a Constituent Society Task Force to “study the IU schools’ constituent societies framework, programs, and services.” The task force was comprised of representatives from the IUAA staff, alumni relations staff members from some of the schools, and several volunteer leaders. The task force report was to be completed by Nov. 1, 2006. (Note that a Regional Campus Constituent Society Task Force will be appointed in 2006 to conduct a similar study for the constituent societies serving the six regional campuses and IUPU-Columbus.)

The task force met three times, conferred with many volunteers and staff members, and performed a benchmarking survey. From these deliberations and findings, several recommendations were formulated that the task force members feel will enhance and significantly improve the constituent society program.

## **METHODOLOGY:**

To complete its charge, the Constituent Society Task Force Committee used the following methodology to determine its recommendations.

**June 2005** – Executive Council focus group developed questions and issues to be addressed by the task force

**Nov. 2005** – Task force appointed by IUAA President and CEO Ken Beckley

**Jan. 2006** – Task force committee met in Bloomington, Ind.

**March 2006** – Task force members met with Bloomington Alumni Professionals Forum

**April 2006** – Task force members met with Indianapolis Advancement Professionals Forum

**April 2006** – Task force committee met at IUPUI

**April–June 2006** – Task force performed a benchmarking survey with peer institutions including:

- Ohio State University
- University of Missouri
- University of Connecticut
- University of Illinois
- UCLA
- Purdue University
- Duke University
- University of Minnesota
- Iowa University
- University of Michigan

**June 2006** – Task force members met with Executive Council focus group

**Aug. 2006** – Task force committee met for its final meeting by conference call

**Sept. 2006** – Task force members met with Bloomington Alumni Professionals Forum

**Nov. 2006** – Task force completed its report and submitted it to IUAA President and CEO Ken Beckley

## **RECOMMENDATIONS:**

### **1. STRUCTURE AND GUIDELINES:**

Constituent societies can more effectively serve IU alumni and schools by implementing the following recommendations:

***A. Establish guidelines for multi-campus constituent societies (schools who represent more than one campus).***

Guidelines for multi-campus constituent societies should include the development of advisory boards by the parent board for all other campuses that grant degrees. Different models could be offered for different schools.

It is also recommended by the task force that a representative from each campus that grants degrees sit on the parent board. Guidelines for campus board would include recommendations for board structure, how to request funds from the parent board, how allocations from the parent board are to be used, and ways to promote membership and activities.

***B. Require each constituent society to establish annual goals and submit them to the IUAA with their proposed budgets by July 1.***

Establishing annual goals and budget will encourage constituent societies to plan for the upcoming year and develop a budget to meet those plans. Having the goals and budget by July 1 will allow the IUAA to begin the fiscal year with budgets in place for the constituent societies. This would coincide with the beginning and ending of constituent societies officers' terms.

***C. Establish criteria for constituent societies with a set of minimum expectations to go along with their annual goals and budget.***

To encourage an active constituent society, the IUAA should develop a minimum set of standards for constituent societies. These standards could become a baseline for any awards program. Through this process, constituent societies not meeting the criteria would be identified and provided additional assistance by the IUAA. Also, the IUAA could possibly develop sanctions for those constituent societies that repeatedly underachieve the standards.

***D. Establish an annual report for constituent societies to document the level of activities and programs.***

The annual reports produced by the constituent societies will create a permanent record of the activities of constituent societies. This will help in communications among constituent societies to see what others are doing. From these reports, a summary report could be developed to include in the Executive Council materials or to be reported at an Executive Council meeting. These reports could become the documents which are used for any awards program.

***E. Develop a model board structure***

Expand the existing Constituent Society Guidelines document to include elements of board structure. These elements could include, but are not limited to: encouraging societies to have a nominating committee which assists in building a diverse board, including student representation; set terms to begin on a July 1 and end on June 30; establish terms lengths (one, two, or three years); encourage term limits; and establish an orientation programs for new board members.

***F. Create policies/guidelines for adopting resolutions and signing contracts.***

Before a constituent society board passes a resolution, it should confer with both the administration of the school and the IUAA to seek input.

**2. NEW INITIATIVES :**

Constituent societies provide a very important service to our alumni, the IU Alumni Association, the schools, and Indiana University. We would like to enhance the program by suggesting the following three new initiatives:

***A. Create a constituent society leadership conference***

Create a constituent society leadership conference to provide current and future constituent society leaders with methodology and tools for continued success. It is also suggested that successful past and current leaders of constituent societies be involved in planning, organizing, implementing, and presenting at the conference. It is further suggested that we invite other successful constituent society leaders and programmers from other peer institutions to be presenters as well. It is felt that this conference should be tied to the annual Executive Council meeting in June.

***B. Develop a constituent society awards program similar to the chapters' model.***

Development of a constituent society awards program similar to the IUAA chapter model. Each constituent society will be assigned to a category based on its size. Constituent societies will compete to attain recognition for certain goals and objectives. It is felt that financial incentives and a banner recognition program are the best ways to acknowledge the success of each category. Examples of the types of awards are: Best and Most Improved recognition for — publications, activities, community involvement, student engagement, membership, scholarships, and obtaining e-mails.

***C. Establish a grant program for special programs or new initiatives.***

Establish a grant program for special programs and new initiatives. In the spring of each year the president and CEO of the IUAA will write to each constituent society to offer them the opportunity to apply for this financial incentive. A committee appointed by the president and CEO of the IUAA will review and select the most innovative programs and initiatives prior to the normal budget cycle of the IUAA.

### **3. COMMUNICATIONS:**

The need for effective communication was reviewed by the task force. Communication is a vital factor for ensuring consistent and effective operations of the constituent society program. Through various communication tools, constituent society staff and boards will have the ability to better meet the needs of alumni and serve the schools. Our recommendations include:

***A. Create an online leadership manual for constituent society leaders and staff.  
Development of a Web-based application tool like the Chapters Resource Center to help manage the flow of constituent society requests for mailings, events, speakers, and more.***

The manual will cover expectations, policies, and roles of board members, and general information on the IU Alumni Association. This manual will be utilized by incoming board members as well as a reference tool for current board members. The Web-based application will also serve as a tool for constituent society staff and volunteers to manage and track requests.



***B. Create a quarterly or semi-annual e-newsletter to all constituent society leaders.***

This would be drafted by constituent society staff and would be a valuable tool in informing alumni leaders and boards of significant changes in the association, important upcoming dates (including the Chapters Major Events list), or changes in services or resources. A print version should also be available for those who are not Web savvy or who prefer to have a hard copy. The newsletter could also provide timely reminders, news, and information about such things as the leaders conference, grant program, awards program, budget deadlines, and related items.

***C. Develop more combined chapters and constituent societies programming***

We suggest ongoing communication between chapters and constituent societies in order to maximize resources, increase attendance, and serve alumni and the university through various events. A list of major chapter events should be sent to the Bloomington Alumni Professionals Forum and the Indianapolis Advancement Professionals Forum. By staying knowledgeable of chapter events, it is possible for constituent societies and chapters to partner on regional events and activities.

***D. Organize an annual or semi-annual meeting between the IUAA president and CEO and chancellors, deans, associate deans, and other departments with external relations staff to educate them about their role in alumni programs and about the IUAA.***

These meetings will serve as an IUAA orientation for those who are new staff members, reinforce their important role in the alumni relations program, and update them on the IUAA.

## **CONCLUSION:**

In conclusion, members of the task force appreciate the opportunity to have served the Indiana University Alumni Association in reviewing the constituent society programs. It is clear we have a solid program and one which can be taken to a new level of activity and support for Indiana University and the association. We look forward to following the progress of the association and its staff as they move ahead in working with the constituent societies.

**APPENDIX:**

**APPENDIX A: TASK FORCE APPOINTMENT LETTER**

**APPENDIX B: CONSTITUENT SOCIETY TASK FORCE ROSTER**

**APPENDIX C: EXECUTIVE COUNCIL WORKSHOP QUESTIONS**

**APPENDIX D: LIST OF CONSTITUENT SOCIETIES**

**APPENDIX E: ELEMENTS & PURPOSE OF A CONSTITUENT SOCIETY**

**APPENDIX F: IUAA SERVICES AND SUPPORT TO CONSTITUENT SOCIETIES**

**APPENDIX G: GUIDELINES FOR CONSTITUENT SOCIETIES**

**APPENDIX H: IUAA BYLAWS PERTAINING TO CONSTITUENT SOCIETIES**

**APPENDIX I: BENCHMARKING SURVEY**

**APPENDIX J: BENCHMARKING SURVEY RESULTS**