

**SUMMIT**

A L U M N I

**The Summit Country Day School  
Alumni Association**

Regional Engagement Playbook

## Introduction

### Purpose

As we build a culture of philanthropy within The Summit community, we need to meet alumni where they are geographically and engage Summit alumni at a national level to build investment and involvement with the school.

### Background

With more than 6,000 Summit alumni worldwide, you'll find Silver Knights everywhere! Moving out of Cincinnati? Check if there is a chapter near you!

Celebrate the significance of being a Silver Knight by attending events and activities with your fellow alumni. Volunteers in each chapter and club ensure Summit has a prominent and vibrant presence across the country.

To fully engage alumni across the country, we'll address the inaugural eight geographic areas where Summit has the most alumni outside of Cincinnati, Ohio. The "hot spot" areas are San Francisco, Denver, Chicago, Boston, New York City, Washington DC, Atlanta and Southern Florida. Our goal is for Summit alumni in those metropolitan areas to become connected and engaged with each other and The Summit through involvement at the local and regional level.

Don't see a chapter or club near you? Get in touch today if you are interested in forming one!

### Definitions

- **Hot Spot** – a metropolitan area where there are 25 or more graduates from The Summit Country Day School, The Summit Middle School, The Summit Boys School, The Summit Boys Middle School or The Summit Girls Middle School.
- **Regional Chapter ("Chapter")** – a recognized group of alumni representing a hot spot who have established their group by having a set of bylaws, an executive leadership council consisting of chapter president, past chapter president and chapter president-elect, and at least two annual alumni events and two annual meetings for the chapter.
- **Regional Club ("Club")** – a recognized group of alumni representing a hot spot that has at least two annual events but do not have an executive leadership council nor bylaws.
- **Executive Leadership Council** – the governing body for each chapter. The positions on the council must consist of chapter president, past chapter president and chapter president-elect at least.
- **Chapter President** – the individual responsible for general and active management of the chapter. This person will preside over chapter meetings and govern the chapter in concert with the chapter president-elect and past chapter president. The term for this position is two years, with an option to renew for one additional term.
- **Chapter President - Elect** – shall serve in the president's role in the absence of the president. The term for this position is two years, with an option to renew for one additional term and will transition into the presidential role.
- **Past Chapter President** – shall be an advisor to the president and president - elect and shall collaborate with the chapter president and president elect for annual planning of chapter meeting(s) and chapter events. The term for this position is two years, with an option to renew for one additional term.
- **Club Host** – the point person in a regional club.

### What is the difference in Regional Clubs versus Regional Chapters?

Alumni clubs and chapters offer opportunities for alumni in a specific geographic region to connect based on their passion for The Summit Country Day School. Alumni chapters and clubs serve to bring alumni together as well as promote and enhance the objectives of The Summit Country Day School, the Summit Alumni Association and any affiliated campus partners. These groups will provide ways for alumni to network, promote fundraisers for Summit, provide professional development and stay connected with other alumni who share similar interests.

A Regional Chapter ("Chapter") is a recognized group of alumni representing a hot spot who have established their group by having a set of bylaws, an executive leadership council consisting of chapter president, past chapter president and chapter president-elect (at least), and at least two annual alumni events and two annual meetings for the chapter.

The formation of a Chapter Leadership council can be established one-to-two years after the actual regional hotspot has been officially established and recognized. Initially, alumni may be unaware of other alumni living in the area, so a year or two of "self-organization" and self-discovery within a regional hotspot is reasonable. It would allow the groups time to figure out a cadence.

A Regional Club ("Club") is a recognized group of alumni representing a hot spot who have at least two annual events but do not have an executive leadership council nor bylaws.

Each regional club and regional chapter must be approved by The Summit Alumni Office and the Summit Alumni Board to be an official group and to receive funding.

### Why have one?

Alumni clubs and chapters extend the reach of The Summit to be nationwide. One of the many goals of The Summit Alumni Association is to get all alumni involved and invested with Summit. Even though two-thirds of alumni live within an hour of Summit, we still have alumni outside the region we want to get involved and remain involved with Summit. Having organized clubs and chapters allow Summit alumni to connect with each other and the school where they are geographically along with many other benefits.

## Clubs




### How to start a club:

- Complete the Regional Club & Chapter Application
- Complete the Club Host & Chapter President Memorandum of Understanding
- Host an initial interest meeting.
- Establish a club/chapter Facebook group.

### How to stay in good standing

- Submit an application every year by August 1.
- Comply with the policies and rules as outlined in the Club & Chapter Memorandum of Understanding.
- The chapter president or club host submits a Club Host & Chapter President Memorandum of Understanding every year.
- Hold at least two events per year.
- Communicate with the Alumni Office about upcoming initiatives.
- A club will be placed on inactive status after one year of failing to meet the minimum requirements. If the club falls into inactive status, a new application will need to be filed and will be taken to The Summit Alumni Board for final approval. All benefits will be waived once placed in inactive status.

### Summit Alumni Club Hosts Contact Info

City	Contact	Email Address	Facebook Group
Denver	Lindsay Wagner '06	lindsayaynwagner@gmail.com	 Denver Summit Country Day School Alumni
Boston	Colin Kegler '93	Kegler@post.harvard.edu	 Boston Summit Country Day School Alumni
Southern Florida	Hayden Klei '11	hayden.klei@gmail.com	 Southern Florida Summit Country Day School Alumni

## Chapters


### How to start a chapter

- Complete the Regional Clubs and Chapters Application
- Complete the Chapter & Club Memorandum of Understanding
- Complete the Club Host & Chapter President Memorandum of Understanding
- Host an initial interest meeting.
- Establish a club/chapter Facebook group.

### How to stay in good standing

- Submit a chapter application every year by August 1.
- Comply with the chapter policies and rules as outlined in the Chapter & Club Memorandum of Understanding.
- The chapter president or club host submits a Club Host & Chapter President Memorandum of Understanding every year.
- Hold at least two chapter meetings per year.
- Hold at least two events per year.
- Communicate any significant changes in the group to the Alumni Office. Changes would include officer changes, bylaw revisions, web page information, etc.
- A chapter will be placed on inactive status after one year of failing to meet the minimum requirements. If the chapter falls into inactive status, a new application will need to be filed and will be taken to The Summit Alumni Board for final approval. All benefits will be waived once placed in inactive status.

## Summit Alumni Chapter President Contact Info

City	Contact	Email Address	Facebook Group
Chicago*	Jane Doe '99	example@abc123.com	 Chicago Summit Country Day School Alumni

\*Example

## Hosting Events

Adequate planning allows the chapter to pace itself and allows the Alumni Office to provide support. When planning events consider the following:

- Type of event/program you want to have
- Planning for each event/program should begin at least six weeks in advance
- Evenly schedule your events throughout the year
- Time of day
- Check for potential conflicts on your desired event dates.
- The audience you are trying to attract (everyone, special interest group, young professionals, etc.)
- Place
- Location
- The cost for alumni and guests to attend
- Invitations and registrations

## Types of Events & Examples

The types of events your club or chapter has is up to you. Make the best of it and remember building strong programs start small and continuously ask for feedback and implement those suggestions appropriately.

Social	Professional Development
Watch parties (e.g. Super Bowl) Brewery, winery/vineyard, or distillery tours Family picnic Group hikes Attend a sporting event Reception at a pumpkin farm Ski trips A hybrid event with another chapter/club	Guest speaker Panel discussion Networking mixers Business luncheons/breakfasts
Community Service	Philanthropic
School supplies drive Volunteering at a soup kitchen/food bank Community clean up Partnering with a local non-profit** Blood drives with a local blood bank	Host a golf outing Summit Giving Day challenge #GivingTuesday challenge Fundraisers for Summit

**\*\*Note: The Summit Country Day School is a 501(c)3, therefore, by school policy, we, and extensions of the Alumni & Development Office, do not provide financial gifts to other 501(c)3 organizations. Alumni Chapters are encouraged to provide its members community service experiences, however, chapter members are not to fundraise for the organization as long as “The Summit Country Day School” name is associated with the opportunity. For example, in order to volunteer with XYZ Non-profit, each registered volunteer should fundraise a minimum of \$X amount for XYZ Non-profit. Chapters and clubs should refrain from engaging in such community service/fundraisers.**

## Alcohol

All chapters and clubs must adhere to The Summit Country Day School's alcohol policy. Advertising or referencing alcohol on school branded communications is prohibited. Do not serve alcohol to anyone under age 21. A designated bartender must serve alcohol. Food and non-alcoholic beverages should be made available at events where alcohol is present.

## Benefits

### Funding and Expenses

Each year, The Summit Alumni Office will allocate funds to each club and chapter. After funds have been distributed in September, funds for any newly created clubs and chapters will be made available as a first come first served basis and at the discretion of the Alumni Office.

Each chapter will receive \$1,000 a year for programming. Accounts will be held and managed by The Summit Country Day School. Each chapter should have a member of their Executive Leadership Council track expenses their chapter incurs as well.

Each club will receive \$500 a year for programming. The Alumni Office will also track expenses for each club and relay available funds.

**No club or chapter is allowed to enter into a contract or agreement with a venue or company. All contracts and agreements must be signed by The Summit's Alumni & Development Office. Any contract or agreement signed by anyone other than a current Summit Country Day School Alumni & Development Office employee, will be the sole responsibility and liability of the signee.**

When you have identified a vendor you'd like to enter a contract with, please fill out a Chapter & Club Funding Request Form. A federal W-9 form is required to be filled out by each vendor at least four weeks before services are rendered or the date of the event; whichever one comes first. A W-9 only needs to be filled out once by each vendor, there is no need to have it filled out annually.

An invoice is required for a payment to be made. All vendor invoices should be sent directly to The Summit Country Day School, 2161 Grandin Road, Cincinnati, Ohio 45208 Attention: Alumni Office or emailed to the Alumni Director. When filling out the funding request form, please attach a copy of the contract to the request or have one emailed to [summitalumni@summitcds.org](mailto:summitalumni@summitcds.org).

Clubs and chapters may raise funds for their group by charging admission for their events. The online registration portal can only be set up by someone in The Summit Alumni & Development Office and funds will be redistributed by The Summit. Any sponsorship opportunities must be approved by The Summit Country Day School before any underwriting can be done.

The Summit runs on a fiscal year of July 1 – June 30. All chapter and club accounts will be zeroed out every July 1 to be congruent with school policy.

Reimbursements will be made on a case by case basis. Please discuss any purchasing options with the Alumni Office **BEFORE** making any purchases personally.

The Summit Country Day School Alumni Association is a non-dues paying organization. Alumni Chapters cannot charge membership dues.

Raffles and lotteries are not permitted as they are considered gambling. There are laws restricting or regulating the conduct of games of chance and vary state to state.

## Marketing

The Alumni Office is excited to have you as a partner to increase Summit alumni engagement and affinity. We will help you advertise your engagement efforts for your market.

How will the Summit Alumni Office help?

- Create a webpage specifically for your club and chapter.
- Create Facebook events for your events and programs.
- Create a Facebook Group specific to your region.
- Advertise through major alumni communication channels.
- Approved use of school's logos.
- Access to regional alumni email addresses.
- Collaborate with you in creating a mass email to go out to your market.
- Posting on the school's calendar of events.
- Approval from the school to name the group an official chapter or club.

Please fill out the Club & Chapter Marketing Form to have your webpage updated to reflect new membership and upcoming events. The Form can be used to initiate the process for help with marketing efforts for your upcoming events and programs. Please allow up to five to seven business days for processing.

## Event Planning

The Alumni Office understands that not everyone is an event planner. We can provide help in the following ways:

- Your Alumni Office representative is well versed in planning events. If you need assistance in planning your event, contact the Alumni Office for help.
- You can request swag items for your event from the Alumni Office. Requests should be made at least six weeks in advance of your event date.
- Summit can set up an online ticketing site for you.
- We can help advertise for your event.

## Bylaws

Chapters may elect to have a set of bylaws in which they operate. Your bylaws should include:

- Mission & Vision
- Leadership structure including term limits for Executive Leadership Council members. Those council member positions must include president, past chapter president and chapter president elect at least.
- Succession Plans
- A template for bylaws can be found [here](#).