CHAPTERS AND REGIONAL PROGRAMS HANDBOOK
(Revised December 8, 2020)
The Chapman University Office of Alumni Engagement is pleased to provide this Chapter Handbook as a resource for Alumni Chapters and developing regional and affinity groups.

It provides helpful tips and contacts to run a successful Chapter and offers guidelines to start a Chapter in your area. Use the Chapter Handbook as a resource to establish and maintain meaningful alumni Chapters.

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CHAPMAN UNIVERSITY MISSION STATEMENT

The mission of Chapman University is to provide personalized education of distinction that leads to inquiring, ethical, and productive lives as global citizens. Chapman University provides educational leadership as a preeminent university committed to excellence, innovation, and accountability in all endeavors.

CHAPMAN UNIVERSITY ALUMNI COMPACT

compact: n. 1. an agreement for mutual benefit between an individual or group and the government or community as a whole.

To create a more perfect University community, Chapman seeks to strengthen its compact with its alumni.

For its part, Chapman pledges to:
- Maintain a lifelong interest in, and affirmation of the personal, professional and spiritual milestones of its alumni;
- Afford alumni a formal, valued voice in all critical institutional matters;
- Engage the alumni in all key facets of University life including signature events, activities and traditions;
- Offer the means for alumni to discover one another, either to re-form bonds or create new alliances;
- Provide information, programs and services that correspond with the strongest alumni interests and needs;
- Welcome them back, through various avenues, and celebrate their return home.

REGIONAL & AFFINITY CHAPTERS AND PROGRAMS MISSION STATEMENT

Alumni Regional and Affinity Chapters and programs extend their familial hand to actively engage alumni wherever they are that show an interest in the welfare of Chapman University, to build new relationships and strengthen old bonds while adding value and purpose to their degrees in the world’s communities through social interaction and networking.
MODELS OF ALUMNI PROGRAMS

What is a Chapter?

Regional Chapters
A Regional Chapter is a geographic-based program that enables alumni to remain connected to their alma mater. There are no membership fees to be a part of the local Chapter.

A Regional Chapter is led by a president or co-presidents and committee heads made up of local alumni leaders who act as ambassadors promoting the relationship between alumni and the University. The Office of Alumni Engagement provides leadership, guidance, and resources in support of Chapters and works closely with Chapter leaders to engage:

- The graduates of Chapman University (more than 50,000 worldwide)
- Current and prospective students
- Parents of students and alumni
- Friends with a vested interest in the welfare of Chapman University

Affinity Chapters
An informal gathering of alumni based on their affinity to the University during their time as students, from Greek life to Chapman Radio, from Black and Hispanic Alumni to LGBTQ, and other shared interests and backgrounds.

Industry and Network Chapters
Career or industry network chapters provide a forum to draw together alumni in similar fields or interests for professional development, regardless of school affiliation or location. Networks shall be regulated and moderated by an alumni leader, receiving guidance and support from the Office of Alumni Engagement to make it more beneficial for all.
BENEFITS OF CHAPTERS AND REGIONAL PROGRAMS

The Office of Alumni Engagement provides unique opportunities to engage alumni. It seeks to encourage alumni to socialize with old and new friends, network with Chapman business contacts, and to give back to the University and their local community by Thinking Chapman First.

Increased Degree Value

Through your leadership and efforts in gathering alumni, parents, and friends, Chapman University will gain a more visible presence in local communities. Chapman University will be seen by communities as an outstanding school that produces active and involved graduates who engage themselves with the community and remain in contact with their alma mater.

Volunteer Recognition

Through your leadership within the Chapman Family, you will be recognized as a key volunteer and ambassador of the University in your local community.

Networking

As an ambassador of the University, you will have the opportunity to build relationships with old and new friends, business acquaintances, and personal contacts.

Shared Experiences

You have the unique opportunity to gather with Chapman University alumni, students, parents, and friends who share a common bond—Chapman University and your experience and future involvement.
LEVELS OF CHAPTERS AND REGIONAL PROGRAMS

Chapters will be classified according to their development, and based on the organization, structure and active involvement of the Chapter’s leadership.

Chapters may adjust to different levels and qualify for lesser or greater amounts of funding, based on the capacity to plan and implement mission-driven events. As the University’s regional and affinity program grows, so too will the potential budget for the program.

<table>
<thead>
<tr>
<th>Chapter Level</th>
<th>Chapter Organization</th>
<th>Chapter Events</th>
<th>Potential Events Funding</th>
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<tbody>
<tr>
<td>Cub Level (Developing)</td>
<td>Chapter leaders will be identified.</td>
<td>Minimal activity, 1 event to gauge interest and Giving Day</td>
<td>$0</td>
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<tr>
<td>Pride Level (Fully Functioning)</td>
<td>2 or more Chapter Leaders and Committee members.</td>
<td>4 events in different program areas, including Giving Day</td>
<td>Up to $250/Annually</td>
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</table>
EXPECTATIONS OF CHAPTERS AND REGIONAL PROGRAMS

Chapters are expected to conduct themselves in a manner consistent with the goals and mission of Chapman University. The purpose of each Chapter shall be to cultivate enthusiasm and foster a mutually beneficial relationship among alumni and their alma mater. The Chapter serves to increase alumni participation and increase awareness in the region and/or affinity and in the progress and needs of the University.

Each Chapter shall:

- Strive to fill the minimum position(s) of:
  - President and/or Co-president
  - Programming/Events
  - Social Media
  - Secretary
- Hold at least quarterly executive board meetings
- Propose a preliminary annual calendar of events to the Office of Alumni Engagement by September 1 of the preceding year for advanced planning and distribution of funding
  - Submit preliminary Event Proposal Forms with the proposed calendar
  - Plan the minimum of events required for the corresponding Chapter level incorporating the three areas of programming:
    - Engagement (Chappy Hours, picnics, sporting events, hikes, etc.)
    - Community Outreach (Soup Kitchen, beach clean up, community service, etc.)
    - Career / University Connections (Industry Network, Summer Welcome Reception, guest lecturers, etc.)
  - Budget events on a “break-even” basis and seek sponsors as needed to reduce costs
- Submit a Post-Event Report within one week, including a final attendance list, receipts (if applicable), and photos to the Office of Alumni Engagement
- Submit an Annual Report by May 5 for evaluation and application for consideration for the Chapter of the Year Award
- Participate in the Chapman Fund and Day of Giving to support University scholarship programs (participation is stressed over $ dollar goals)
- Communicate on a regular basis with the Alumni Engagement Office regarding Chapter budgeting and programming
- Participate in quarterly conference call workshops/Zooms for all Chapter leaders and Office of Alumni Engagement.
IDEAL STRUCTURE OF CHAPTERS AND REGIONAL PROGRAMS

Membership

Membership to a Chapter shall consist of all individuals with an interest in the welfare of Chapman University, including but not limited to alumni, parents, friends and students who reside and receive mail in the region. There are no membership fees to be a part of the Alumni Association or a local Alumni Chapter.

Ideal Leadership Model

Each Chapter shall be led by a president or co-presidents and key leadership committees. The most important role of Chapter leadership is to cultivate enthusiasm and build participation in the region or with the identified affinity group.

The **IDEAL** Chapter Leadership and Committee Heads shall actively recruit potential new leadership to ensure seamless transition of their position and continuity in Chapter functions and responsibilities. A succession and transitional plan should be laid out by each Chapter.
Chapter executive officers and corresponding responsibilities include, in order of priorities, beginning with the three core positions:

- **President or Co-presidents**
  - Represents the alumni Chapter as the elected liaison to the Chapman University Alumni Association;
  - Serves as an ex-officio member of all Chapter committees;
  - Serves as an active member of the Chapter Presidents’ Council;
  - Collaborates with committee heads to establish board meeting agendas and presides over all Chapter meetings;
  - Works with officers and committee heads to establish the Chapter’s objectives for the year and works toward long-term goals;
  - Oversees activities and delegates responsibilities to officers and committees;
  - Assists the Vice Presidents with committee member selections;
  - Attends annual Alumni Association Chapter Leadership Conference Retreat meeting or appoints another officer to represent the Chapter (when applicable);
  - Coordinates and facilitates bi-annual elections of officers with the Office of Alumni Engagement
  - Instructs successor on the duties of the president.

- **Past President**
  - Serves in an advisory role to the President;
  - Serves as an ex-officio member of the Membership Development Committee;
  - Assists in training the incoming President.

- **Vice President, Programming**
  - Chairs and delegates responsibilities of the Events Committee;
  - Performs the duties of the President in his/her absence;
  - Assists the President in meeting the Chapter’s objectives for the year and setting long-term goals;
  - Develops annual calendar of events, proposes budget, and supervises all event charges with guidance and support from officers and committees;
  - Submits content for each event to the Office of Alumni Engagement in a timely manner;
  - Assigns officers and committee members as points of contact for each Chapter event;
  - Responsible for compiling financial information and event evaluations for the annual report;
  - Assists in training of successor.

- **Vice President, Membership Development**
  - Chairs and delegates responsibilities of the Membership Development Committee;
  - Primary responsibility of alumni outreach in the region by developing processes for engaging and establishing strong personal connections with alumni;
  - Ensures officers and committee members strategically outreach to recruit new alumni by personal phone calls and/or accompanying to Chapter events;
  - Develops a plan for officers and committee members to make personal contact with current and perspective students to invite them to Chapter events;
  - Responsible for providing updates for the Chapter alumni database
(including information related to interests) and reporting updates to the Office of Alumni Engagement in a timely manner;
  o Assists in training of successor.

- **Vice President, Volunteer Services**
  o Chairs and delegates responsibilities of the Volunteer Services Committee;
  o Responsible for incorporating service opportunities into chapter programming;
  o Develops process for implementing a mentorship program to connect students and recent graduates with fellow alumni in coordination with the Office of Alumni Engagement;
  o Creates a database of alumni, parents and students who are affiliated with charitable organizations;
  o Works with Manager of Volunteer Engagement to identify and track alumni volunteers
  o Assists in training of successor.

- **Vice President, Community Relations**
  o Chairs and delegates responsibilities of the Community Relations Committee;
  o Serves as principal ambassador to the local community;
  o Manages and maintains any Chapter Alumni Online, Facebook, or LinkedIn groups, as established by the Chapter;
  o Participates in planning and outreach related to increasing overall attendance at Chapter events;
  o Submits requests for Chapter-related articles to the Office of Alumni Engagement for the monthly Alumni e-Newsletter or the Chapman Magazine;
  o Assists in training of successor.

- **Secretary (Optional)**
  o Assists the President in an administrative role with tasks and duties as assigned;
  o Responsible for quarterly reporting of volunteer hours of Chapter executive officers and committee members to the Alumni Association for recognition and corporate matching gifts;
  o Takes minutes from each Chapter board meeting and distributes to executive board and the Alumni Association;
  o Responsible for submitting to the Alumni Association all annual required forms and materials.

Chapter committees and corresponding responsibilities include:

- **Events Committee**
  o The Events Committee is responsible for the overall creation, implementation, and success of events.
  o Assists the Vice President of Programming to staff events and greet guests at registration; and coordinates all Chapter functions with the help from executive officers.
  o Submits photos, attendance list and post-event report following an event.
  o All tasks that fall under the areas of focus will be supported by this committee.
    - **Engagement**
      i. Develops meaningful relationships through engaging social events such as Chappy Hours, picnics, hikes, museum visits,
etc.

- **Athletics**
  - Plans events centered on Chapman athletics and regional sporting events, and coordinates other collegiate and West Coast Conference opportunities in the area.

- **Lifelong Learning**
  - Coordinates continuing education activities through Chapter event planning.

- **Membership Development Committee**
  - The Membership Development Committee is responsible for strengthening relationships and establishing personal connections with alumni before and after events, and informs them about upcoming Chapter activities.
  - Assists the Vice President of Membership Development to design activities for each Chapter event that will highlight the importance of continuous involvement with the Chapter and the Alumni Association.
  - Enacts a phone/text plan to follow-up to written and e-mailed Chapter announcements.
  - All tasks that fall under the areas of focus will be supported by this committee.
    - **Parents and Students Engagement**
      - Incorporate parents, prospective and current students in Chapter events.
      - Serve as liaison between the chapter and the Office of Parent Engagement
    - **Young Alumni (within 10 years of graduation)**
      - Plan events that are geared towards young alumni and encourage participation in all Chapter activities.

- **Board Development**
  - Cultivate potential chapter leaders to become involved in the planning process and ultimately, transitioning into an active officer or committee role.

- **Diversity**
  - Engage minority and underrepresented alumni through generating ideas and involvement in existing chapter activities.

- **Volunteer Services Committee**
  - The Volunteer Services Committee is designed to fulfill the mission of the University by coordinating activities involving volunteerism and community service for the Chapter.
  - All tasks that fall under the areas of focus will be supported by this committee.
    - **Career Connections**
      - Recruits mentors for the Young Alumni Society and/or each school’s career offices, and developing methods to connect alumni in transitional career phases. Help build relationships with current students for professional development including Thinking Chapman First in hiring opportunities and providing informational interviews.
    - **Community Service**
      - Orchestrates Giving Day, a University-wide day of service.
• **Community Relations Committee**
  o The Community Relations Committee is responsible for increasing awareness, and establishing a presence of the Chapter and the University in the region.
  o Assists the Vice President of Community Relations to recruit new alumni in the region by developing processes for increasing overall attendance at events; when requested and invited, assists the Office of Admissions with recruiting prospective students from the region by attending college fairs or planning information nights.
  o All tasks that fall under the areas of focus will be supported by this committee.
    - **Sponsorship**
      ■ Secure companies or individuals who would provide a mutually beneficial partnership with Chapman University for special events.
    - **Publicity**
      ■ Contact local media to get coverage of philanthropic and major speaker events.
    - **School Recruitment**
      ■ Attend perspective student receptions, Regional Pop-Ups, admission receptions, Summer Alumni Welcome receptions for new alumni, and send-off parties to represent the Alumni Association;

**Elections**

With the assistance of the Office of Alumni Engagement, the current Chapter President shall e-mail the region for leadership interest and promote elections for Chapter President.

Nominations can be made by any Chapter member, and all Chapter members are eligible to vote, but must be present at elections. Those interested in the position of Chapter President must submit a bio for approval by the Office of Alumni Engagement during the open nominating period.

**Chapter Reviews**

The Office of Alumni Engagement will annually review the overall success and participation of chapters in alignment with the mission of the University.

Chapters are responsible for submitting an Annual Report by May 5 as a means of self-evaluation and application for the Chapter of the Year award.

Upon completion of this form by the deadline, all Chapter Presidents will be given copies of each submitted application for review. Each Chapter President, with the advice of the Office of Alumni Engagement, will evaluate all submitted applications and vote for the top three chapters, not including their own chapter. Votes must be cast by
May 31. The Office of Alumni Engagement will tally the votes, and then select the top chapter.

The Chapter of the Year will be announced during the annual Alumni Association’s Chapter Leadership Conference Retreat.

If basic board development and event expectations are not met, then the Office of Alumni Engagement may change the chapter status.
CHAPTER CALENDAR PLANNING

Calendar Proposal

All Chapters should propose a preliminary annual calendar of events by June 1 of the preceding year to allow time for approval and design development for mailings. Please include scheduled Chapter Executive Board meetings or conference calls on your calendar for easy reference.

When submitting your calendar of events, please be sure to include an Event Proposal Form per event to the best of your ability with an estimated budget for cost-incurring events.

- Event name
- Proposed date
- Tentative location
- Description (how do you want this event advertised on the Web site?)
- Assigned Chapter Executive Board member
- Budget with estimated expenses and revenue

The Office of Alumni Engagement will review the calendar for approval. Should your proposed event conflict with another University program, holiday, or cannot be properly supported by the University, an agreement or compromise will be reached. If the event is deemed inappropriate or not in alignment with the mission of the University, it will not be accepted.

Chapters are encouraged to hold a preliminary chapter retreat to brainstorm and discuss ideas for events and incorporating the goals of the Chapter with each activity.

Completed Event Proposal Forms MUST be submitted at least six weeks for non-paid events and eight weeks for paid events prior to the preferred date. (exception: big-budget events require three months for planning)

Budgeting

Event funding is available based on the corresponding Chapter tier. To receive seed money, a budget must be submitted for the events where costs are incurred.

All events that have expenses must be approved by the Manager and Director of Alumni Engagement.

Additional funding may become available for key events, with proper advanced planning and necessity.
Event Programming and Branding

There are three areas of programming we ask each Chapter to include in developing their calendar: community outreach, career connections, and engagement. We also offer event-branding suggestions to provide continuity among the Chapters.

- **Community Outreach**
  
  *Examples*
  - Giving Day
  - Direct volunteer opportunities (soup kitchen, beach clean-up, Special Olympics)

- **Career Connections**
  
  *Examples*
  - New Graduate Night to Network
  - Industry luncheons
  - Corporate/Alumni Association partnerships
  - Lecturers/Career coaches
  - Coffee with a visiting Dean or Professor

- **Engagement**
  
  *Examples*
  - Chappy Hour
  - Alumni Night at the Ballpark
  - Best of Chapman (visiting faculty speakers)
  - Alumni Welcome Receptions
  - Hikes
  - Cultural activities (museums, concerts)
  - Picnics
  - Panther athletic events

Please follow the procedures for executing an event properly as noted in the Event Planning Checklist. It is important to delegate responsibility from booking a location to arranging sponsorships so the workload is not overwhelming. **The quality of the event will suffer with insufficient planning and execution time.**

Post-Event Reporting

Within one week after an event, please e-mail the following materials:

- Post-Event Report
- Final budget breaking even
- An accurate attendance list
- Photos

Be sure to submit the receipts immediately following an event, so the Office of Alumni Engagement can process reimbursements or payments in a timely manner.

All of this helps in the process of tracking alumni and success of events so we can better serve and meet the needs of Chapters.
HOW TO START A CHAPTER

Objectives

The purpose of a Cub Level (Developing Chapter) shall be:

• To establish a mutually beneficial relationship between Chapman University, its alumni and friends within the region you reside
• To recruit and facilitate connections between alumni and supporters of Chapman University
• To sponsor and support programs and activities that will enhance the image and mission of Chapman University
• To include alumni and students from all schools of Chapman University, parents, and friends

Initial Interest

To gauge interest in the region to develop a Chapter, we suggest the following procedures:

• The Office of Alumni Engagement will receive and gather requests from online chapter interest forms, alumni officer referrals or any other recommendations to identify alumni from the region that are interested in starting a Chapter
• Interested alumni will work with the Office of Alumni Engagement to create a survey or interest letter to be e-mailed to all alumni, parents, and friends in the area
• Use the survey and assistance from the Office of Alumni Engagement to identify those who are interested in leadership roles and those who are interested in a supportive role

Creating a Regional Developing Board

Developing Chapter approval is subject to performance, event success, and participation by the Regional Developing Board.

• Interested volunteers will be grouped as Regional Representative and assigned to an Office of Alumni Engagement staff member who will be a liaison to the region
• The staff member will schedule a preliminary conference call with Regional Representatives to discuss chapter expectations, brainstorming, and alumni goals
• Each Regional Representative must submit a Chapter Application to the Office of Alumni Engagement.
Launch Event

To ensure that sufficient volunteer support exists in an area before establishing a Chapter, the Regional developing volunteers should first organize an event to gauge interest for Developing Chapter status.

- Set a date, time and location for a launch event to gauge interest from the local region
- Assign responsibility to each Regional Representative for the event planning procedures and complete an Event Proposal Form to submit to the Alumni Association
- Schedule a follow-up conference call with the Regional Developing Cub Level Volunteers and have one person facilitate taking notes on following up with a Post-Event Report
- Plan at least one other event from a different programming area
- Funding is available on a case-by-case basis for launch events.

Becoming Approved

Once approved as a Developing Chapter, complete the following requirements to be chartered:

- Recruit and maintain an active Regional Developing Board
- Provide the Office of Alumni Engagement with updated e-mail addresses and contact information of interested alumni to be tracked for involvement
- Hold at least three executive board meetings
- Hold a minimum of two events incorporating two of the following programming areas:
  1. Community Outreach (community service, etc.)
  2. Career Connections (networking receptions, etc.)
  3. Engagement (social gatherings, sporting events, etc.)
- Submit an Event Proposal Form for each event at least six weeks for non-paid events and eight weeks for paid events before the date
- Submit a Post-Event Report within one week, including a final attendance list, receipts (if applicable), and photos to the Alumni Association
- Maintain communications with the Alumni Association at least once a month to report progress

If all the requirements are completed, a Developing Chapter may grow into a Pride Level (fully functioning) Chapter as determined by the organization, structure and active involvement of the new Chapter Board and its volunteers established in the region.

To aid in the success of Developing Chapters, the Office of Alumni Engagement will provide support and resources to each Developing Chapter, as time and abilities permit.
CHAPTER AWARDS AND RECOGNITION

Through your leadership within the Chapman community, you will be recognized as a key volunteer and ambassador to the University in your local community.

**Chapter of the Year**

Awarded to the premier Chapter of the year as voted on by peers.

**Panther of Excellence**

Bestowed upon a Chapter leader who embraces the mission of the University and actively engages alumni, parents, students, and friends beyond the status quo of events.

**In the Spotlight**

Recognizing the dedication by those individuals who work hard to engage alumni and students while committed to the mission of Chapman University.
OFFICE OF ALUMNI ENGAGEMENT SUPPORT

To aid in the success of Chapters, the Office of Alumni Engagement will provide support and resources as needed by Chapters in the following ways:

- Advice, direction, and resources for each Chapter in planning events
- Leadership training, including workshop conference calls and invitation to the Alumni Association Chapter Leadership Conference Retreat
- A Chapter Web page on the University Web site and online tools to promote the Chapter, updates to Web calendar listings, provision online registration for events
- Broadcast e-mail support: proofing and revising of broadcast e-mails; collection of updated alumni contact information from the database; e-mailing constituents
- Financial assistance: processing of credit card payments through online registration, initial funds to purchase bulk tickets and place deposits (on case by case basis)
- Event funding through seed money, distributed on need basis, varying by Chapter organization and success
- Directory of alumni database with contact information
- Calendar planning assistance
- One yearly mailing of approved events

The Alumni Association and the Office of Alumni Engagement are here to provide benefits and support to all members. Please contact us with any questions, comments, or suggestions so we can all better serve the Chapman community.

Bill Guzik, JD ’98
Manager of Alumni Engagement
Chapters and Regional Programs
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guzik@Chapman.edu
<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
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<tbody>
<tr>
<td>June 1</td>
<td>Proposed Chapter Calendar Due</td>
</tr>
<tr>
<td>June</td>
<td>Calendar Approval</td>
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<tr>
<td>June – July</td>
<td>Alumni Summer Welcome Reception (#1) (An event to celebrate the return home of current and newly graduating students in a region)</td>
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<tr>
<td>June – August</td>
<td>New Student/Parent Welcome Receptions (Organized by Office of Parent Engagement)</td>
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<tr>
<td>June - August</td>
<td>Alumni Association Chapter Leadership Conference Retreat</td>
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<tr>
<td>July – September</td>
<td>Chapter Board Elections (Biannually)</td>
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<tr>
<td>August</td>
<td>All new and old Chapter Executive Board members Conference Call</td>
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<tr>
<td>October</td>
<td>Chapman Family Homecoming / Stay At Home Homecoming / Chapman 5k (#2)</td>
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<tr>
<td>November</td>
<td>Chapter Presidents Conference Call</td>
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<tr>
<td>November 1</td>
<td>Chapter Bylaws Due</td>
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<tr>
<td>January</td>
<td>Chapter Presidents Conference Call</td>
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<tr>
<td>January 31</td>
<td>Chapter Presidents cast votes for Chapter of the Year</td>
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<tr>
<td>Jan-Feb</td>
<td>Chapter Event (#3)</td>
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<td>March</td>
<td>All Chapter Executive Board members Conference Call</td>
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<tr>
<td>March-June</td>
<td>Chapter Calendar Planning</td>
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<tr>
<td>April</td>
<td>Chapman Giving Day (#4)</td>
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<tr>
<td>May 5</td>
<td>Annual Report Due (and Chapter of the Year Application)</td>
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<tr>
<td>May</td>
<td>Chapter Presidents Conference Call</td>
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<td></td>
<td>University Commencement</td>
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