Penn Alumni recognizes shared interests to be a critical part of what connects so many alumni with each other and with Penn. Therefore, in alliance with its mission to establish a mutually beneficial lifelong relationship between the University and its alumni, and to encourage peer-to-peer interaction, Penn Alumni formally supports the development and existence of Penn Alumni Shared Interest Groups (SIGs).

Grass-root efforts have long been underway to bring alumni together based on shared interests, and some alumni leaders have expressed interest in their groups being officially recognized by Penn. Please read on to learn more about SIGs, how they will be supported by Penn Alumni, and how you can get one started.
What support & benefits will SIGs receive from Penn?

- A *Penn Alumni SIG Resource Guide* detailing recommendations and best strategic practices for event organization, communications, internal leadership development, volunteer recruitment, and more.

- Support and guidance regarding organization/volunteer management, event logistics (e.g. identifying appropriate locations, recommending speakers), Penn faculty speaker outreach, alumni outreach, and other needs as they arise.

- Development of codes in the alumni database to identify membership; access to an annually updated list of contact information for all self-selected alumni participants.

- Inclusion in the Penn Alumni Council of Representatives.

- Coordination of up to four “blast e-mails” per year to alumni who have expressed interest in the SIG.

- A landing page, linked to the Penn Alumni web site, including general information about the SIG and, if applicable, links to other pages hosted by the SIG.

- Penn Alumni leadership training and networking opportunities with the heads of other Penn Alumni organizations.

- Assistance with scheduling and room reservations for on-campus activities.

- Promotion of the club where possible to populations/at activities related to the shared-interest in question.

What is a SIG?

Penn Shared Interest Groups are groups of 50 or more alumni who share common interests arising from, for example, their Penn co-curricular activities or professional career experience, and who desire to affiliate with each other as a subgroup of Penn Alumni.
PENN SIGs actively engage alumni by communicating and/or gathering around a central unifying purpose, mission, background or activity beyond class year affiliation, cultural affiliation, or regional proximity (see other existing alumni volunteer opportunities).

- Event materials box containing Penn Alumni nametags, brochures, and stationery good for invitations and thank you notes.
- The opportunity to apply for “Partners with Penn” designation after two consecutive years in good standing. PWP will reward Penn’s most organized and active SIGs with their choice of one of the following*:
  - A Penn Alumni banner (approximate size: 5’ long, 3’ high)
  - An online gift certificate good for Penn merchandise
  - Assistance with one snail mailing or printing
  - Assistance with the cost of one event

*Further details to be provided during the application process.

With the exception of PWP rewards, Penn Alumni does not provide funding to Shared Interest Groups. In general, a SIG would be supported solely by membership fees/dues/assessments.
How do SIGs remain in good standing?

- Adhere to the University’s policy on the use of the Penn name and insignia/logos as provided by Penn Alumni.

- Respect Penn Alumni’s responsibility to remain neutral on all political, social and economic issues both inside and outside the Penn community; any position of the SIG must always be qualified with clear language that states “The [GROUP] does not represent the President and Trustees of the University of Pennsylvania or Penn Alumni.”

- Comply with Penn’s policy of nondiscrimination by not discriminating on the basis of race, color, sex, sexual orientation, gender identity, religion, creed, national or ethnic origin, citizenship status, age, disability, veteran status or any other legally protected class.

- Restrict solicitation of corporate sponsorship for an event to an amount that does not exceed the greater of (1) the expenses of a particular event, or (2) the SIG’s annual operating expenses; requests for and acknowledgements of corporate sponsorships must clearly state that the contribution is to the SIG and not to Penn; Assistant Vice President of Alumni Relations must review and approve all corporate sponsorships equal to or in excess of $500.

- Not be established to support a Penn research center or initiative without written permission from the Provost’s Office.

- Refrain from admitting to its membership any individuals who are not members of the current Penn community (alumni and their spouses/partners, students, faculty, staff, parents and visiting fellows); at the discretion of the SIG, non-Penn community members may participate in SIG events.
faith

- Remain independent and not become a chapter of a non-Penn organization.
- Be governed primarily by Penn alumni (defined as any individual who has spent one year in a University of Pennsylvania degree-bearing program), i.e. with a governing body comprising at least three-fourths (75%) Penn alumni.
- Require all Board members to be registered members of QuakerNet, the Penn Alumni Online Community.
- Submit an annual report on membership and programming that includes a summary of group activities, samples of any materials produced by the group, and the number of active members as of the end of the fiscal year.
- Submit a renewal form every five years to maintain recognition and benefits.

*Penn Alumni reserves the right to determine the degree of adherence to these operating principles. On a case by case basis, Penn Alumni may endorse and facilitate partnerships between SIGs and Penn Clubs and between SIGs and any parallel student-based organization or club.*
How do I establish a SIG?

**Step 1: Proposal and Alumni Petition**

- The development of any such group will rely initially on an explicit volunteer-driven, grass-roots effort; alumni must clearly identify themselves as having an interest in the mission of the SIG.

- An individual graduate or collection of alumni seeking to establish a SIG must submit a **concept proposal** that includes a petition of a minimum of 50 alumni names and signatures who support the proposal and pledge to join the group.

- The SIG will specify the members who will serve as contacts with Penn Alumni.

- Upon submission of the proposal, the group leaders will receive additional information, including forms and sample language to assist with Step 2.

**Step 2: Mission Statement, Constitution, and Incorporation**

The SIG must submit:

1) A mission statement with the SIG’s nature and purpose.

2) A constitution including information on the following:

- **Operating Principles**: Each SIG must acknowledge the operating principles set forth in this document as part of the body of their constitution.

- **Nomenclature**: The name of the SIG must include the word *Alumni* and must not include the word *Trust* or the word *Fund*.
Establish a SIG (cont.)

- **Governance**: Each SIG is an independent volunteer-driven entity and as such, Penn Alumni is in no direct way involved in its management; Penn Alumni may suggest a basic governing structure that has worked for other groups.

- **Penn Alumni Limitation of Liability Disclaimer**: Neither University of Pennsylvania nor Penn Alumni is responsible for the group’s practices, and reserves the right to deny the SIG any and all benefits of affiliation at any time if the SIG is in breach of the operating principles set forth in this document.

3) Proof of incorporation. All Shared Interest Groups must file for incorporation in the state where they are formed, establishing the SIG as a legal entity separate from its members and directors. For more information, and a guide on how to incorporate in your state, visit this helpful site.
How do I establish a SIG? (cont.)

**Step 3: Penn Alumni Recognition**

All submitted information will be reviewed by both Penn Alumni staff and the Executive Committee of the Penn Alumni Board of Directors, and a letter of notification will be issued as soon as possible. If the SIG is not approved, a letter will be sent with an explanation and recommendation for future action.

If the SIG is approved, the letter will be accompanied by a confidentiality agreement for the SIG’s leadership to sign, which will allow Penn Alumni to share a list of updated contact information on the signers of the proposal. To facilitate SIG-related alumni outreach, each petitioner’s name will be coded in Penn’s alumni database as being a member of the new SIG, and will maintain such coding. As new members of the Penn community join, they, too, will be coded.

Approval will expire after a five year period from the date of approval from Penn Alumni. To remain active and in good standing, a SIG must submit an application for renewal to Penn no later than 30 days prior to the expiration date. Should that date pass without a SIG submitting a renewal application, the SIG will no longer be considered “in good standing.” As such, it will lose recognition and all other benefits of being a SIG, and must reapply to regain them.

Appeal of the provisions either of the operating principles or the Procedures for Establishing and Maintaining a Shared Interest Group may be made to the Executive Committee of the Penn Alumni Board of Directors in writing, stating the reasons for the request for non-adherence.
How can I learn more about alumni involvement?

- Attend your next undergraduate class REUNION.
- Get in touch with your GRADUATE/PROFESSIONAL SCHOOL and learn how to become involved.
- Stay current with news and events in MULTICULTURAL OUTREACH; join a group in the Penn Alumni Diversity Alliance.
- Attend events hosted by your LOCAL CLUB and meet other alumni in your area.
- Discover ongoing opportunities to stimulate your intellect at your destination for LIFELONG LEARNING.
- CONNECT with Penn Alumni on Twitter, Instagram, Facebook, and LinkedIn.
- Make a difference for prospective Penn undergraduates through the Penn Alumni INTERVIEW Program.
- Explore the world with exciting and educational trips with Penn Alumni TRAVEL.
- Tap into the valuable PROFESSIONAL RESOURCES available to Penn Alumni including mentoring, webinars, and more.
- Find out about unique initiatives for YOUNG ALUMNI around the world with yPENN.
- Take advantage of the Penn Alumni ONLINE COMMUNITY – search the directory, promote your business, and more.
- Read your excellent Penn Alumni MAGAZINE, The Pennsylvania Gazette.
- Return to campus for Homecoming in the fall, or Alumni Weekend in the spring. SAVE THE DATE!
- Learn how Penn is making an impact, and how you can SUPPORT the University’s most important initiatives.

Visit www.alumni.upenn.edu to find all of the above, and more!

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