

Chapters Terms of Reference

Ontario Tech University Alumni Association

Alumni Association Council

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Article 1: Definitions

- 1.1 “ALUMNI”:** Graduates of Ontario Tech University who have received a degree, diploma, or certificate from the institution;
- 1.2 “ALUMNI ASSOCIATION COUNCIL (AAC)” OR “COUNCIL”:** The governing body of the Ontario Tech University Alumni Association, outlined in Article 5 of the Alumni Association Council’s Terms of Reference;
- 1.3 “ALUMNI OFFICE (AO)”:** The Alumni Office is the university department responsible for the oversight and coordination of alumni engagement activities on behalf of Ontario Tech University. Alumni Chapters operate in partnership with the Alumni Office and the Alumni Association Council and are expected to align their activities with university priorities, policies and the Alumni Engagement Strategy;
- 1.4 “ASSOCIATION”:** Comprises all General Members of the Ontario Tech University alumni body;
- 1.5 “CHAPTER”:** A self-organized community of Ontario Tech University alumni, established around a shared interest, identity, profession, academic background, or geographic location. The Alumni Association Council endorses chapters;
- 1.6 “COMMITTEE”:** A group established by the Alumni Association Council to address specific tasks or areas of focus. Committees may be formed on an ad hoc or ongoing basis;
- 1.7 “COUNCIL MEMBER”:** A General Member elected or appointed to serve on the Alumni Association Council;
- 1.8 “GENERAL MEMBER”:** Any individual who meets the alumni criteria as outlined in the Alumni Association Council’s Terms of Reference, Article 3: General Membership;
- 1.9 “HOMECOMING” OR “ALUMNI DAY”:** The university’s annual alumni reunion event held on campus, designed to reconnect alumni with their peers and the university community;
- 1.10 “Staff Liaison”:** A Staff Liaison is a representative of the Ontario Tech Alumni Office responsible for providing institutional information, guidance on university and Chapter policies and procedures, and support to ensure effective Chapter operations, governance, communications, and alignment with university and Alumni Office priorities and expectations;
- 1.11 “UNIVERSITY”:** Refers to Ontario Tech University.

Article 2: Chapter Purpose

2.1 Overview

2.1.1 Chapters are communities of Ontario Tech University alumni brought together by shared interests, experiences, and/or identities. These groups foster meaningful connections and engagement by supporting our alumni's personal and professional growth. Whether in person or online, Chapters span across faculties, graduating classes, geographic regions, and professions.

2.1.2 Self-organized and volunteer-led, Chapters enhance the Ontario Tech alumni experience by offering opportunities for:

- (a) Networking
- (b) Mentorship
- (c) Continuing education
- (d) Career development
- (e) Fundraising initiatives

2.1.3 These groups are primarily intended for Alumni and, as such, current students and/or friends of the University are invited to participate as guests but can not obtain membership in these communities. Chapters are intended to complement, rather than compete with, existing Ontario Tech alumni programs, faculty initiatives, and Alumni Association Council (AAC) activities.

2.1.4 Chapters may be formed around a variety of affinities, including:

- (a) Geographic location (regional or international);
- (b) Professional fields or industries;
- (c) Academic majors or programs of study;
- (d) Graduation year or class cohort;
- (e) Shared interests or passions;
- (f) Shared identities or backgrounds.

2.2 Guiding Principles

2.2.1 Chapters are built on the belief that an engaged alumni community:

- (a) Enhances the reputation of Ontario Tech University;
- (b) Contributes to the personal and professional success of its members;
- (c) Reinforces lifelong connections with the University and broader community;
- (d) Promotes a lasting sense of belonging.

2.2.2 Establishing Chapters directly supports Ontario Tech University's Alumni Engagement Strategy. These groups contribute to key strategic pillars, including:

- (a) **Tech with a Conscience:** Promoting ethical technology practices and initiatives that drive positive societal impact.
- (b) **Alumni Engagement Re-Imagined:** Offering personalized engagement opportunities tailored to the unique interests and identities of alumni.
- (c) **Sticky Campus:** Fostering a strong sense of belonging and long-term alumni involvement with the university community.
- (d) **Partnerships:** Creating platforms for collaboration between alumni, Ontario Tech, and external organizations for mutual growth.
- (e) **Telling Our Story:** Empowering alumni to shape and share the university's narrative through their unique experiences and achievements.

2.3 Contact and Oversight

2.3.1 The Ontario Tech Alumni Office is the primary point of contact for forming, recognizing, and providing ongoing support for Chapters.

2.3.2 The Alumni Association Council provides advisory oversight and alignment with alumni strategy and governance.

2.3.3 All inquiries, proposals, and reports may be submitted to: alumni@ontariotechu.ca

Article 3: Formation of Chapters

3.1 Purpose

Chapters begin with a shared vision among a group of Ontario Tech alumni. Establishing a new group involves ensuring alignment with the [Alumni Engagement Strategy](#) and building a strong foundation for future success.

3.2 Steps to Establish a Chapter

3.2.1 Gather a Core Team: Identify a minimum of two (2) committed alumni to lead the development of the group. One individual must be identified as the lead contact.

3.2.2 Prepare Your Application: Your application must include:

- (a) Proposed Name of the Chapter
 - (i) The name must begin with "Ontario Tech University Alumni."
 - (ii) The name must not include the word "Association," as it may be mistaken for the Alumni Association Council.
- (b) Purpose Statement: A clear purpose statement demonstrating alignment with the Alumni Engagement Strategy.
- (c) Proposed Activities and Objectives: A summary of proposed activities, objectives, and potential impact, with a focus on: Personal and/or professional development, strengthening the Ontario Tech alumni network, and increasing alumni pride.
- (d) Representation: A description of the identity, interest, or experience the group represents.
- (e) Leadership Information: Names and contact details of two (2) to three (3) alumni willing to lead, with one identified as the lead contact.
- (f) Relevant History: Any relevant history of the group or similar initiatives.

3.2 Application Review Process

Applications will be processed in four stages:

3.2.1 First Review: The application will be received by the Alumni Engagement Committee to ensure the alignment of the proposed Chapter with the engagement strategies outlined in the Alumni Engagement Strategy.

- (a) **If denied**, the applicant will receive a detailed explanation outlining the reasons for the rejection, along with recommendations for resubmission. Once the applicant has addressed and implemented these recommendations, they may proceed to the next phase. However, the AAC reserves the right to reject an application without providing recommendations for revision if it doesn't align with the criteria outlined in 3.2.2.
- (b) **If approved**, the application will move on to the next stage of the approval process.

3.2.2 Second Review: The reviewed application will be passed to the Alumni Governance Committee to ensure compliance with all AAC governing documents. This stage will follow the process outlined in 3.2.1(a) and 3.2.1(b).

3.2.3 Third Review: The application will be presented at a meeting of the Alumni Association Council as an approval item, where at least 50% +1 are in favour of the motion. Applicants are welcome to attend and may address any questions about their submission during the session.

3.2.4 Final Approval: The Alumni Office will review the application to ensure University policies and procedures compliance. This stage will follow the process outlined in 3.2.1(a) and 3.2.1(b).

- (a) **If denied**, the applicant will receive an explanation and a written follow-up once the Council meeting has concluded.
- (b) **If approved**, the application will follow the motion conditions and start with their Pilot year as outlined in 4.1.1. Converting from a Pilot to a Chapter is outlined in section 4.1.2.

3.3 Grounds for Rejection of a Chapter Application

3.3.1 An application to form a Chapter may be rejected if it does not align with the strategic priorities or values of Ontario Tech University. Grounds for rejection include, but are not limited to:

- (a) **Misalignment with University Values:** The proposed group purpose or planned activities conflict with the values or have the potential to impact the reputation of Ontario Tech University or the Alumni Association, including content or actions that promote discrimination, exclusion, or intolerance.
- (b) **Political, Religious, or Partisan Activity:** Chapters must remain inclusive and nonpartisan. Applications centred on political parties, ideologies, or religious denominations may be denied if they are not inclusive or risk alienating members of the alumni community.
- (c) **Duplication of Existing Groups:** If a similar Chapter exists, new applications may be redirected to support or join the existing group to avoid redundancy and fragmentation. Through the appeal process outlined in section 3.4, the applicant will be requested to submit a written explanation as to the differences.
- (d) **Insufficient Alumni Representation or Engagement:** Applications must demonstrate sufficient alumni interest and involvement as outlined in Section 3.2.1. Proposals lacking this engagement may be rejected.
- (e) **Failure to Demonstrate Purpose or Impact:** If the application does not clearly articulate a meaningful purpose, proposed activities, or alignment with the Alumni Engagement Strategy, it may not be approved.
- (f) **Violation of AAC or University Policies:** Any application that promotes or tolerates behaviour such as harassment, bullying, hate speech, unethical conduct, or discriminatory practices will be automatically disqualified.
- (g) **Conflict with Existing University or AAC Initiatives:** If the proposed group's goals conflict or compete with University-led or Alumni Association Council programs, it may be rejected to ensure alignment and cooperation.
- (h) **Commercial or Financial Motives:** Chapters may not be formed for the primary purpose of personal profit, business promotion, or fundraising unrelated to Ontario Tech or its alumni initiatives.

3.3.2 A rejection on an application could come from either the AO and/or the AAC.

3.4 Appeals Process

3.4.1 Applicants who wish to appeal a decision regarding an application for a Chapter must submit a written appeal **within 30 days of receiving the decision notice**. The appeal must clearly outline the grounds for reconsideration, referencing specific elements of the original application, response, and any relevant supporting documentation. A rejection of an application could come from either the AO or the AAC.

Valid grounds for appeal may include:

- (a) Procedural errors or oversights in the review process
- (b) Misinterpretation or misunderstanding of the information provided
- (c) New, relevant information that was not available at the time of the original submission
- (d) Evidence that the decision does not align with the stated Chapter eligibility criteria or the strategic priorities of the Alumni Association.

3.4.2 Appeals should be submitted through <alumni@ontariotechu.ca>. Upon receipt, the AAC Governance The committee will review the appeal and may request additional information or a meeting with the applicant for clarification.

3.4.3 The Governance Committee, in collaboration with the Alumni Office, will provide a written response within 45 days, which may include:

- (a) Upholding the original decision;
- (b) Reversing the decision and granting conditional or full approval;

- (c) Requesting resubmission with specific revisions;
- (d) Decisions made following the appeal process are final. Additional information on appeal procedures and criteria can be requested by emailing: alumni@ontariotechu.ca

Article 4: Compliance and Accountability

4.1 Active Standing & Ongoing Compliance

4.1.1 Pilot Chapters are responsible for:

- (a) Having at least one (1) member attend the Annual General Assembly (AGM);
- (b) Driving their own programming, development and growth;
- (c) Planning and executing a minimum of one (1) initiative per year;
- (d) Complying with Ontario Tech's policies and procedures;
- (e) Regularly communicating with the Alumni Association Council;
- (f) Receiving approval for any and all usage of the University logo. The staff liaison will facilitate the approval process. Usage should follow the guidelines put forth in the University style guide;
- (g) Refraining from creating independent social media channels;
- (h) Maintaining familiarity with the documents, tools and guidelines included in the Chapter Community Tool Kit; and
- (i) Submitting an annual report detailing activities, outcomes, and budget usage.

4.1.2 Pilot Transition: All Chapters must complete one (1) pilot year and comply with all active standing conditions. Additionally, the following actions must be conducted:

- (a) Complete one full year in good standing;
- (b) Continue to meet all Pilot Chapter requirements; and
- (c) Schedule and participate in a review meeting with the AAC and the Alumni Office.

4.1.2.1 Once the group has met these conditions, the Chapter must seek full status through motioning the AAC and securing approval. Through the Governance Committee, a motion must be submitted to the AAC to grant the Chapter full status. Applicants are welcome to attend and may address any questions about their full status request during the session. Final approval of the chapter's ratification sits with the Alumni Office.

4.1.3 Probation: Chapters may be placed on probation if they:

- (a) Fail to deliver a minimum of one initiative within a 12-month period;
- (b) Do not engage in regular communication with the AAC;
- (c) Found to be non-compliant with Ontario Tech's policies and procedures; or
- (d) Demonstrate a lack of leadership continuity or engagement.

4.1.3.1 Probation is a formal warning period of up to 6 months during which the group must work with their assigned staff liaison to correct issues and return to active standing.

4.1.4 Suspension: If a Chapter does not address the concerns identified during probation, it may be suspended. During suspension:

- (a) All group activity is paused;
- (b) Access to funding, support, and space is revoked; and
- (c) The Alumni Office and AAC will conduct a formal review.

4.1.4.1 Suspension may last up to 12 months, after which a decision will be made to either reinstate or dissolve the group.

4.1.5 Dissolution: A Chapter will be formally dissolved if:

- (a) The issues identified during probation and suspension remain unresolved;
- (b) There is a sustained lack of participation, leadership, or compliance; and
- (c) The group formally requests dissolution due to a lack of interest or internal challenges.

4.1.5.1 Dissolution removes the group's access to all alumni resources, branding, and representation under Ontario Tech's name.

4.1.6 Reactivation: Previously dissolved groups may submit a written request for reactivation to the Alumni Office. The request must include:

- (a) A new leadership plan;
- (b) A draft initiative proposal; and
- (c) A commitment to compliance with all active standing requirements.

4.1.6.1 If approved, the group will re-enter as a Pilot Chapter and complete a full pilot year before regaining full standing.

4.2 Alumni Office Team Responsibilities

The Ontario Tech Alumni Office team is committed to supporting the development and success of Chapters. Their responsibilities include:

- (a) Engaging with Chapters to provide tools, training, and ongoing guidance;
- (b) Maintaining the Chapter Community Tool Kit with updated documents, templates, and best practices;
- (c) Assisting with volunteer recruitment and programming support
- (d) Managing alumni communications and promoting Chapter initiatives through Ontario Tech channels;
- (e) Supporting the group's online presence (e.g. LinkedIn and Instagram)
- (f) Providing access to on-campus meeting space (North or Downtown) with a minimum of 15 business days' notice; and
- (g) Offering funding support for approved initiatives and events.

4.3 Alumni Association Council (AAC) Responsibilities

- (a) The AAC is responsible for:
- (b) Providing the Pilot Chapter with a Welcome package;
- (c) Serving as a peer resource and governance support to all Chapters;
- (d) Collaborating with the Alumni Office to review pilot groups for full Chapter status;
- (e) Facilitating leadership development opportunities; and
- (f) Ensuring alignment between Chapter activity and the broader alumni engagement strategy.

Article 5: Additional Considerations

5.1 Legal Relationship

Ontario Tech University formally recognizes chapters. Recognition does not grant any legal or contractual authority to act on behalf of the University or the Alumni Association Council.

5.2 Contracts and Agreements

Chapter leaders and members are not authorized to enter into contracts or agreements on behalf of Ontario Tech University, the Alumni Association Council, or the Chapter itself. Any contractual obligations must follow university policies and be facilitated through the Ontario Tech Alumni Office.

5.3 Alumni Contact Information (FIPPA Compliance)

5.3.1 Due to the Freedom of Information and Protection of Privacy Act (FIPPA), the University cannot release alumni contact information. Mass communications (emails or mailings) to members of the Alumni Association must be coordinated through the designated staff liaison in the Alumni Office.

5.3.2 Any alumni personal information collected at Chapter events must be submitted to the staff liaison to maintain the confidentiality of that information and for alumni record and database updates. Chapters are not permitted to maintain independent or "shadow" databases. Doing so may result in the suspension or dissolution of the group.

5.4 University Code of Conduct

Chapters must operate in accordance with Ontario Tech University's Code of Conduct. The University reserves the right to withdraw recognition from any Chapter that fails to adhere to program or institutional guidelines or whose actions are inconsistent with the University's values.

5.5 Conflict Resolution and Code of Conduct Violations

Chapters are expected to address internal conflicts inclusively, respectfully, and in alignment with the University's values. When internal resolution is not possible, the issue must be escalated to the Alumni Office and AAC. Repeated or unresolved violations of the Code of Conduct may result in probation, suspension, or dissolution as outlined in Section 4.1.

Article 6: Chapter Finances

6.1 Alumni Office Funding

Subject to availability, the Ontario Tech Alumni Office may provide financial support to recognized Alumni Chapters to assist with Chapter events and initiatives that align with the university's Alumni Engagement Strategy.

6.2 Funding Requests and Approval

6.2.1 All funding requests must be submitted through the designated Chapter Funding Request Form prior to making any purchases or financial commitments.

6.2.2 Submission of a funding request does not guarantee approval. All funding requests are reviewed at the discretion of the Alumni Office, and the Alumni Office reserves the right to approve, deny, or modify requests for any reason.

6.2.3 No purchases, contracts, or financial commitments may be made on behalf of the Chapter or the University without prior written approval from the Alumni Office.

6.3 Eligible uses of funds

6.3.1 Funding may be used to support approved Chapter activities and initiatives, including but not limited to:

- Food and beverage expenses.
- Venue or rental space costs.
- Event materials or supplies.
- Approved activities and programming support.

6.3.2 Alumni Office funding may not be used for the purchase of alcohol.

6.4 Payment and Reimbursement Procedures

6.4.1 Where possible, approved expenses will be processed and paid directly by the Alumni Office.

6.4.2 In situations where direct payment is not feasible, approved expenses may be reimbursed to the Chapter representative upon submission of all required documentation and receipts.

6.5 Reporting and Accountability

6.5.1 Following a Chapter event or initiative, Chapters are required to provide the Alumni Office with:

- A list of event attendees.
- Copies of all applicable receipts and supporting documentation.
- Any additional information requested by the Alumni Office.

6.5.2 Failure to comply with funding procedures, reporting requirements, or University policies may result in denial of future funding requests, suspension of funding privileges, or additional actions as determined by the Alumni Office.

Article 7: Review and Amendment Process

- 7.1 The Terms of Reference will be reviewed every two years by the Alumni Office in collaboration with active Chapter leads and the Alumni Association Council.
- 7.2 Proposed changes may be submitted in writing by any recognized Chapter.
- 7.3 Once reviewed and approved, amendments will be communicated to all Chapters and reflected in the published version of the Terms of Reference.