

A guide for

Global Club and Shared Interest Group Leaders



[Alumni.columbia.edu](https://alumni.columbia.edu)

NOTE FROM THE PRESIDENT OF THE CAA

Volunteer leaders of global clubs and shared interest groups give life to the mission of the Columbia Alumni Association (CAA)—strengthening connections among alumni worldwide while deepening alumni engagement with the University. From Athens to Atlanta, Tokyo to Tucson, our global clubs and shared interest groups provide access to intellectual, social, and professional opportunities for an alumni base of 380,000.

We created this guidebook to provide essential information to alumni leaders looking to create and sustain effective organizations. It is intended as a guide that clarifies best practices and defines standards while recognizing that no two groups operate in the same manner. At the most basic level, for example, some initiatives are led by a large group of directors; in other cases, a single alumnus/a may be leading the charge.

As you go about your work in a particular region or shared interest group, we hope you will refer to this guidebook. Please do not hesitate to contact us when questions arise. We have a dedicated staff of alumni relations professionals standing at the ready.

Roar Lions, Roar!



Donna MacPhee '89CC, P: '17CC
Vice President for Alumni Relations,
President, Columbia Alumni Association (CAA)



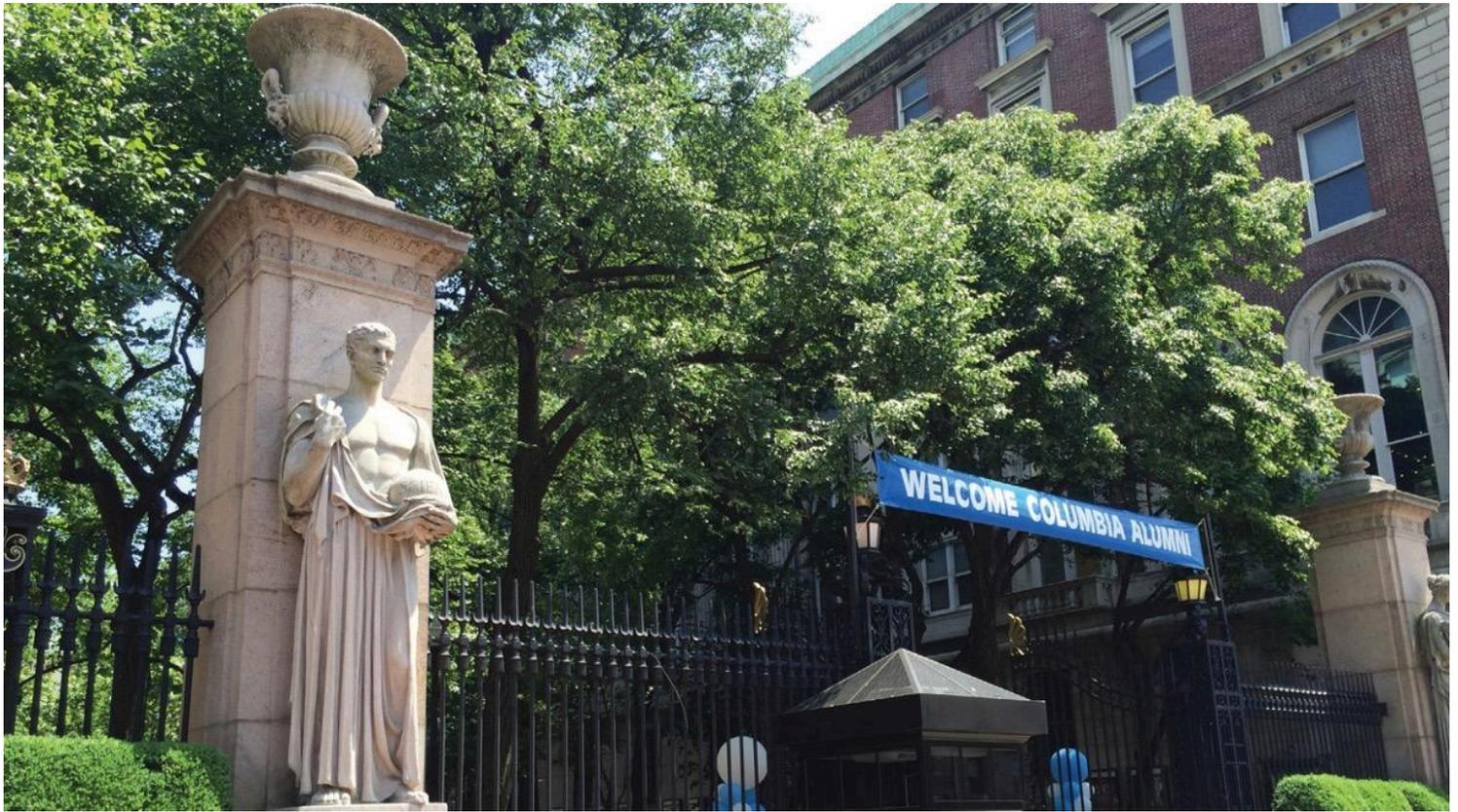


TABLE OF CONTENTS

Mission of Global Clubs and Shared Interest Groups	4
Expectations	8
Club Organization and Governance	9
CAA Annual Programs	14
Marketing and Communications	15
Style Guide - Quick Reference	16
Trademark (Licensing) Guidelines	17

Please note: This guidebook is intended to provide general information and guidance. It does not provide legal or tax advice for any specific situation.

MISSION OF GLOBAL CLUBS AND SHARED INTEREST GROUPS

The mission of the CAA is as follows:

The Columbia Alumni Association (CAA) is a global network that unites you with a diverse community of almost 380,000 leaders and creators, bound together by our shared University connection and our collective passion, intellect, and drive. United, we are creating meaningful change for our University and around the world. The CAA offers a professional network, a social circle, a sustaining link to Columbia's schools and faculty, a repository of resources, a source of intellectual inspiration, and a lifelong connection to an unparalleled academic institution. Through over 100 global clubs, shared interest groups, and diverse digital programs, you have the opportunity to engage with the people, places, and issues that challenge and move you to action.

The goals of the Columbia Alumni Association are:

- To strengthen the bonds of fellowship among alumni worldwide
- To sustain the connection between them and the University
- To act as a means through which they can contribute their collective knowledge and perspective to the life of the University
- To develop from their ranks effective and responsive leadership

Columbia global clubs and shared interest groups will benefit from a brief mission statement that is easily grasped by members and that sets out a clear set of objectives. A sample mission statement might read as follows:

The purpose of [name of global club or shared interest group] is to foster and strengthen the relationship between Columbia University and alumni by:

- Connecting alumni through planning educational, cultural, and social programs
- Building a partnership serving as a channel of communications between the University and her alumni
- Renewing and broadening Columbia connections through social and intellectual activities
- Developing a diverse, active, and informed local alumni community
- Increasing the level of financial support to the University
- Building loyalty, pride, and alumni involvement in the life of the University
- Acting as ambassadors of Columbia University and supporting the University's mission

Finally, it is important to emphasize that Columbia University simply cannot advance its standing as one of the world's foremost centers of higher learning without committed alumni support, active alumni advocacy, and visionary alumni leadership.

Columbia Alumni Association Board

The CAA Board is the governing body of the University-wide Columbia Alumni Association (CAA); all alumni are officially members of the CAA. The CAA Board seeks to keep alumni connected to and with the University at large and also the constituent Schools. If nominated to this board, there are term limits and a rotation process to guarantee a good cross-section of alumni leaders at all times.

Associations & Clubs Committee Overview

The Columbia Alumni Association (CAA) Committees provide the infrastructure to support CAA alumni leaders and clubs with the resources needed to engage with Columbians around the world. The Associations & Clubs (A&C) Committee fosters relationships among the CAA and affiliated associations and global clubs of the University. With the goal of sharing best practices among the affiliated associations and clubs, the Committee supports leadership training for club leaders and provides operational support models and best practices for the benefit of all Columbia alumni groups.

Associations & Clubs Subcommittees Overview

As the A&C Committee and its responsibilities grow, we look to have experienced leaders and volunteers join our Committee to help spearhead important initiatives that serve the entire alumni population. The subcommittees under the A&C Committee provide their guidance, insight, and expertise in a number of priority areas. Subcommittees are chaired by an A&C Committee liaison that is responsible for reporting back to the A&C Committee on the activities and progress of their assigned subcommittee. All subcommittees will have the support from an assigned CAA staff liaison.



GLOBAL CLUBS AND SIG'S OVERVIEW

CAA Global Clubs and Shared Interest Groups

CAA defines clubs or shared interest groups (SIGs) as formally structured organizations of alumni who participate in regional activities, share a common identity or background, or participate in activities around a shared interest, as well as University initiatives that foster a continued relationship with Columbia and one another. Global clubs and Shared Interest Groups are organized with a governing set of principles that connect alumni to one another by their passions, their backgrounds, their interests, and their ongoing engagement with the University.

Mission of Global Clubs and Shared Interest Groups

The mission of a global club is to be dedicated to the promotion of the welfare of Columbia University, the preservation of its traditions of excellence in education and service, the engagement of alumni with each other and the University, as well as the advancement of Columbia's stature in the global club's geographic area. Similarly, SIGs have the same charge amongst communities of alumni with the same background, identity, interest, or profession. Clubs and SIGs should represent the interests of the entire Columbia University community of alumni, students, parents, and friends to participate in the association's activities.

Global Alumni Club and Shared Interest Group Leader

A global club and SIG leader is an important partner of Columbia University and plays a vital role keeping alumni connected to each other, the University and CAA. A global club or SIG leader should possess the following characteristics - willingness to work with the University, willingness to contribute time, enthusiasm, ability to motivate and engage alumni and volunteers, an understanding of the needs of the community they represent, as well as adhere to the club or SIG's governance including term limits outlined in their constitution/bylaws for continued growth and involvement in community.

Regional Ambassador

Regional ambassadors are individual alumni representatives in domestic or international regions who want to actively engage alumni where no club exists. Regional ambassadors assist in promoting engagement opportunities with the University, as well as serve as the alumni contact in the area for the Columbia Alumni Association and other alumni in the region.

To see a full list of CAA Global Clubs and Shared Interest Groups, please visit our website at <https://alumni.columbia.edu>.

Demographics 2024

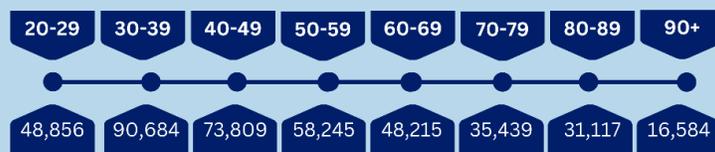
About Columbia's Alumni Community



alumni by school

1. Columbia College — 55,874
2. Business — 52,999
3. Engineering — 52,578
4. GSAS — 49,647
5. Law — 30,679
6. SIPA — 26,380
7. General Studies — 24,838
8. Social Work — 22,172
9. Public Health — 18,489
10. Professional Studies — 16,464
11. GSAPP — 15,568
12. Athletics — 13,955
13. Journalism — 13,446
14. Nursing — 12,001
15. Arts — 9,382
16. Physicians and Surgeons — 9,001
17. Dental Medicine — 6,425
18. Teachers College — 4,459
19. Barnard College — 4,082

alumni by age



alumni by decade



**select Global Clubs will receive their own specific demographics map*

Expectations

To achieve a successful partnership, the CAA, global clubs, and SIGs must work together toward common goals. At the heart of this partnership is strong communication that makes explicit the needs and expectations of each entity. The expectations below are based on years of experience working with successful clubs and SIGs worldwide. They lead to the achievement of common goals and provide a free flow of information between the CAA and the alumni volunteer leadership to better serve all Columbians. The CAA expects the leadership of each club and SIG to meet regularly and to follow a minimum set of standards to help guarantee the vitality and longevity of the effort.

Global clubs and shared interest groups should:

- Have an active leadership group with officers and bylaws approved by the CAA
- Host successful programs and events, the number and type of which can be decided based on the size and interests of the constituency
- Submit event registration and attendee lists to the CAA within two weeks of an event's completion
- Maintain a strong and active web presence via a hosted CAA website (if eligible) and/or social media pages that are updated frequently
- Engage in regular efforts designed to increase club/SIG membership and participation
- Participate in CAA wide leadership initiatives
- Annually submit information regarding membership, leadership, active volunteers, governance, and programs either through an annual report or another mutually agreed upon format.
- Serve as a resource for individuals within the Columbia community they represent
- Regularly identify and develop potential alumni leaders
- Abide by all University policies, including but not limited to, data privacy (including [GDPR](#) and [Columbia University Online Alumni Community Terms and Conditions](#)), [trademark guidelines](#), [the CAA Protocols](#), and the [Memorandum of Understanding](#) (international clubs)

If expectations are met, Columbia will provide:

- A free 'alumniclubs.columbia.edu' email forwarding address
- Event promotion on the CAA calendar and promotion on the CAA website
- Access to a monthly newsletter specifically curated for CAA alumni leaders
- Invitation to the CAA's annual Columbia Alumni Leaders Experience conference in the fall
- CAA staff support who will serve as program consultants, strategic partners, and provide guidance for navigating University community
- If eligible, a free website to promote events and communicate with members, as well as ongoing maintenance of the website and training for leaders
- If not eligible for a website, the CAA will assist clubs and SIGs with sending emails to alumni in your specific community

Columbia is pleased to provide the benefits and services described in this section to eligible clubs/SIGs at the current time. The University's ability to provide such benefits/services is subject to future changes, limitations, and restrictions.

CLUB ORGANIZATION AND GOVERNANCE

Term Limits:

Club officers usually serve up to two terms with each term lasting two or three-year with elections taking place at an annual meeting, board meeting, virtually via web conference, or email. The maximum acceptable term varies depending on the club or group's bylaws. Terms generally run in accordance with the CAA's fiscal year which begins on July 1 and ends June 30 of the succeeding year.

Directors/Officers:

Some of our smallest global clubs are run by a single volunteer who is the “go-to person” for all things Columbia in a given region (Regional Ambassadors). However, most clubs and SIG are led by a board, which meets regularly to plan events and programs that strengthen Columbia's presence and alumni engagement in a given region or within a specific community. At a minimum, the CAA encourages three or more volunteers to assume responsibility and help ensure a strong succession plan and timely reporting.

Organizations are empowered to determine the leadership structure that best suits their needs. While a traditional board structure works for some groups, a board of “equals” may work better for others. No matter what size volunteer group you have, we require that you identify a president to act as a main point of contact. If your organization maintains its own bank account, we ask that you also identify a treasurer, although the president may fill this role. Depending on an organization's legal structure, certain other positions, such as a secretary, may be required as well

Whether the organization is made up of alumni from a specific region or alumni that share a similar identity or interest, we encourage all boards to be diverse and representative of their community. The larger your alumni base, the more board members you are likely to have. Depending on the size and organization of your board, you may want to consider some of the officer positions described below. When enlisting board members, it is helpful to use written job descriptions that detail the specific responsibilities and time commitment of each position. This will give potential volunteers a clear idea of your expectations. We encourage you to tailor the following examples of common officer positions to your specific needs As a reminder, these descriptions are suggestions, not requirements.



President

- Fosters the success and growth of the organization
- Serves as primary contact to the CAA staff liaison and Office of Alumni and Development
- Oversees volunteer management, all activities and delegates specific duties and responsibilities to board and officers
- Appoints committees and schedules regular leadership meetings
- Presides at executive committee and general membership meetings
- Promotes participation in club/SIG and University activities and programs
- Works to recruit and identify new alumni volunteers as officers for the board
- Schedules and conducts regular board meetings, including an annual meeting, at which time the calendar of events for the upcoming year will be developed
- Attends the annual Columbia Alumni Leaders Experience
- Participates in CAA conference calls as scheduled

Vice President

- Performs the duties of the president in his/her absence
- Oversees the development and coordination of events
- Works with officers and alumni to generate event and programming ideas
- Becomes familiar with the duties of the president and long-range plan of the organization

Treasurer

- Sets up and maintains bank account (if applicable)
- Serves as co-authorized signer with president to pay necessary bills
- Collects and records sources of income from all events and membership dues (if applicable)
- Prepares an annual financial report submitted annually to membership and the CAA (if applicable)

Secretary

- Maintains records and minutes of all meetings and pertinent information related to the organization to maintain a history of activities
- Circulates minutes of meetings to all officers
- Communicates to board members about upcoming meetings
- With the president, maintains contact with the CAA staff liaison

Membership Chair

- Solicits and maintains current membership forms and records
- Tracks dues-paying members (if applicable)
- Ensures membership forms are available at events
- Works with board to increase membership and retention

Program Chair

- Develops a diverse array of activities and programs to engage alumni
- Solicit programming ideas from other alumni volunteers
- Oversees event committees and special events
- Reports to board on programming status
- Works with the CAA staff liaison to help plan and promote events

Communications Chair

- Publicizes club events, meetings, and programs through the organization's website
- Maintains current and accurate content on website
- Creates and updates social media accounts
- Works with the CAA staff liaison to help plan and promote events

Recent Alumni & Student Chair

- Organizes activities and programs to attract recent alumni (defined as having graduated from Columbia University in the last 10 years)
- Coordinates with board to recruit recent alumni for volunteer leadership opportunities
- Develops programs to engage current students from the community represented (SIGs) or when they are in a specific region during academic breaks (Global Clubs)
- Encourage young alumni participation by direct outreach and work with the event chairs to make events more accessible (in terms of cost, timing, and activity) to a broader spectrum of people, especially young alumni

Ivy League & External Liaison

- Coordinates events with other Ivy League schools
- Partners with external groups for events, networking opportunities, etc.

Career Chair

- Serves as the liaison to various University career offices
- Actively encourages alumni to interview/hire Columbia students and alumni
- Promotes local networking opportunities

CLUB COMMITTEES

Forming committees is an excellent way to recruit more alumni to volunteer and develop future leadership. Examples of committees include:

Advisory Committee

This committee comprises former presidents, board officers, and active alumni to serve as advisors to current board leadership and to assist with special projects and programs.

Program and Events Committee

This committee develops program ideas for events as well as oversees the implementation of special club/SIG or University-hosted events.

Nominating Committee

This committee prepares the election ballot and oversees the election process for officer positions.

Membership Committee

This committee is responsible for maintaining and increasing membership.



VOLUNTEER RECRUITMENT, DEVELOPMENT, AND SUCCESSION PLANNING

The key to a successful volunteer organization is leadership renewal and succession planning, one of the first things a club leader should do is identify his or her replacement.

Recruitment

The most successful organizations actively cultivate a pool of participants who are learning the ins and outs of the organization and increasing their involvement as they help. These volunteers should be developed with leadership roles that fit their skill sets and interests in mind. When starting a new organization or recruiting new volunteers, work with your CAA staff liaison to reach out to a wide community of alumni. It is also helpful to include a volunteer sign-up line on all electronic or postal mailings, inviting members to indicate interest, suggest program ideas, and update their addresses. Lastly, volunteer positions and assignment descriptions which are current, clear, thorough and include clear expectations of time and responsibilities involved goes a long way in building a strong volunteer base.

Retention

Keeping track of volunteers enables clubs/SIGs to know where help is needed. An effective president must also know how to delegate responsibilities to members of the organization. Sharing the workload makes volunteers feel supported and appreciated. Emphasizing training, supportive efforts, teamwork, and keeping your pool of potential volunteers fresh helps you and your volunteers from becoming overwhelmed. If done correctly and consistently, the volunteers will have the motivation and ability to do their jobs, the organization will function well as a whole, and everyone will share in its success.

Succession Management

For the long-term health of your organization, it is vital that your leadership pay significant attention to succession management. Active, ongoing succession management planning will help ensure there is always a leader ready to take the place of an outgoing officer.

Establishing a structure that prioritizes volunteer management, development, and training is important. Many boards falter in leadership succession when a few key officers are relied upon to get all the work done. Appointing a variety of relevant committees, with both short-term assignments and longer-term leadership priorities, will help to establish a pipeline for future leaders.

It is imperative to keep records of your volunteers, their interests, the activities they carried out, and basic contact information. Using the Global Club and Shared Interest Group Report as a guideline, and keeping your CAA staff liaison informed of all your volunteers' contributions are other important ways of ensuring your group's long term success.. Showing volunteers future

opportunities can help enhance the appeal of current volunteer roles, your CAA liaison can consult with you to help plan a volunteer's further succession into other important roles at Columbia University, beyond the global club or shared interest group level.

RECOGNITION AND AWARDS

Recognition

Thanking volunteers in a timely and appropriate manner is crucial for retention and cultivation of leaders and volunteers. There are many ways to do this. A sincere, public thank you at an event is important to those who worked behind the scenes to put the event together. Not only does it thank people for a job well done, but it also shows potential volunteer planners that volunteers are truly valued within the organizations. Additionally, you may choose to hold a thank-you reception or picnic for all volunteers at the end of the year.

Alumni Medal

Volunteers with over ten years of service to the University can be nominated for the Alumni Medal. The Medal, first awarded in 1933, recognizes alumni for distinguished service of ten years or more to the University — including its schools, alumni associations, global clubs, and University-wide initiatives. Past medalists have inaugurated or improved alumni programs, provided visionary leadership of school-based and University-wide alumni associations or global clubs, and have organized important outreach initiatives that have fostered new and expanding relationships between alumni and the University, both here and abroad. The alumni medals are awarded on Commencement Day.



CAA ANNUAL PROGRAMS

Global clubs and SIGs have the opportunity and are encouraged to participate in the following CAA annual programs:

CU there! (Year-round)

CU there! gives Columbia students from across the University the chance to network with alumni at gatherings across the globe. Whether it is for career opportunities or getting oriented in a new city, our community of 365,000 alumni, in more than 100 clubs and SIGs and living in 184 countries, connect with students throughout the year.

Columbia Alumni Leaders Experience (Fall)

Each year, alumni leaders from participating schools across the University come together for Columbia Alumni Leaders Experience to hear updates on Alma Mater, connect with fellow volunteers and be inspired as we work together to move Columbia forward. Featuring prominent speakers, school and University-wide discussions among alumni leaders, and a gala dinner honoring alumni medalists, the weekend helps alumni leaders share new ways to understand, connect, and act.

Giving Day (Fall)

You'll join thousands of fellow Columbians—alumni, students, parents, friends, neighbors, faculty, and staff—as we come together to give to and through Columbia. You can choose to support the schools and programs that have made a difference in your life, and advance causes and projects that will make a difference in the lives of others.

Columbia Connects (Fall)

A worldwide networking event which brings alumni together to share their Columbia connection and experiences and welcomes new graduates to alumni communities across the globe.

International Student Send-offs (Summer)

These events are organized by the Columbia Alumni Association's international global clubs and are open to students enrolling in Columbia. Incoming students are welcome to attend the event to meet alumni, future classmates, and learn all about life at Columbia. Events are organized based on host availability, ease of access to the area, and the number of students nearby.

MARKETING AND COMMUNICATIONS

CAA Alumni Events Calendar

Visit alumni.columbia.edu to view our global clubs and shared interest groups calendar to see events taking place around the world.

CAA Newsletter

The global CAA e-newsletters are sent monthly and contain upcoming events, professional development opportunities, campus updates, research, and alumni news. Any CAA Global Clubs or Shared Interest Group event open to all alumni may be considered for inclusion in the newsletter.

CAA Social Media

Facebook: www.facebook.com/ColumbiaAlumniAssoc

Twitter: [@ColumbiaAlumniA](https://twitter.com/ColumbiaAlumniA)

LinkedIn: www.linkedin.com/groups/55739/profile

Instagram: [@columbiaalumni](https://www.instagram.com/columbiaalumni)

YouTube: www.youtube.com/user/columbiaalumni

NationBuilder

NationBuilder provides an online presence for global clubs and shared interest groups. With NationBuilder, organizations can easily set up a website that includes email tools and event management. For global clubs, the CAA can import data from the alumni database into NationBuilder so that you don't have to build your constituent base from scratch. Visit leaders.alumni.columbia.edu to view the alumni leader toolkit.

To find out if your club or group is eligible for a website, reach out to your CAA liaison. Please contact caaalumnirelations@columbia.edu for a copy of the NationBuilder Training Manual.

STYLE GUIDE - QUICK REFERENCE

1. Identify alums as follows:

John Smith '91JRN

2. Make sure the apostrophe is pointing in the correct direction.
3. Use the school codes listed below.
4. If alumni have multiple degrees, separate with a comma:

Jane Smith '83CC, '86GSAS, '93LAW

5. Alumni may be identified as parents, in appropriate contexts, like so:

Donna MacPhee '89CC, P: '17CC

6. Don't use periods for academic degrees: BA, PhD, JD, MSW

**See complete Style Guide for official school names*

BUS	Business	NRS	Nursing
CC	Columbia College	PH	Public Health
DM	Dental Medicine	PS	Physicians and Surgeons
GS	General Studies	SEAS	Engineering and Applied Science
GSAS	Graduate School of Arts and Sciences	SIPA	International and Public Affairs
GSAPP	Architecture et al.	SOA	School of the Arts
JRN	Journalism	SPS	School of Professional Studies
LAW	Law	SW	Social Work

Affiliates

BC	Barnard College	TC	Teachers College
JTS	Jewish Theological Seminary	UTS	Union Theological Seminary

The full Associations & Clubs (A&C) "Best Practices in Communications" can be found at <https://leaders.alumni.columbia.edu/communications>.

ALUMNI ASSOCIATIONS, CLUBS AND SPECIAL INTEREST GROUPS LICENSING GUIDELINES

Alumni Groups – including Associations, Global Clubs (clubs), and Shared Interest Groups (SIGs) -- who wish to design and purchase merchandise for a giveaway, resale to, or any other use on behalf of their own constituent Groups, must follow the guidelines of Columbia University Licensing and the Columbia Alumni Association (CAA), per the Guidelines below.

Use of Columbia University Licensed Marks and Insignia

Columbia University's Trademark and Licensing Program is in place to protect and safeguard the proper use, throughout the world, of Columbia University marks and insignia, including the University's name, crowns, and individual School and Department logos. In turn, the CAA has its own style guide that pertains to Alumni Groups as it relates to the protection of the University's name, marks, and logo, the CAA brand, and Alumni Group-related names, marks and logos.

One important element of protecting the marks, and thereby the University's larger reputation, is ensuring that apparel and goods bearing University marks are produced only by vendors who have been licensed by the University to produce those items. These licensed vendors have undergone a rigorous application and vetting process to guarantee their compliance with the University's manufacturing Code of Conduct, which is closely aligned with the Worker Rights Consortium's model code, and their active affiliation with the Fair Labor Association, which protects workers' rights. Formal licensing agreements between those vendors and the University's Licensing Agent, together with an approval process for individual products, serve to ensure that items bearing the Columbia University marks, and also the CAA insignia, meet quality and character criteria, and that production of those goods is accurately recorded.

It is imperative that Alumni Groups discuss any proposed merchandise, logos, and marketing concepts with the CAA and receive approval before uploading images or descriptors and starting a campaign, per the Guidelines below. In addition to the permissions set for the use of the University marks, the use of the eight-leaf Ivy vine, the phrase "All-Ivy," and the descriptor "Ivy League" are not available for Alumni Group use.

Guidelines for Use of University Marks and Insignia by Alumni Groups

- Alumni Groups, like all entities affiliated with the University, who wish to order merchandise on behalf of their Group, for any purpose, must use one of the vendors who is licensed by the University to produce such merchandise. That list of vendors, updated periodically, is

available here to download:

<http://www.exemplarassociates.com/columbia#columbia-vendors>

- Merchandise produced by Alumni Groups must meet these criteria and requires the Alumni Group to submit to the CAA a completed [pre-approval marketing form](#) for review and approval by the CAA.
- Merchandise produced by Alumni Groups must include their approved alumni club or SIG name on any such merchandise, and may not use only the “Columbia University” name, only the University crown, only the CAA logo, or reference only a specific Department or School name.
- Any use of the University crown, CAA logo, or an affiliated club or SIG name should align with the font and layout of the CAA-approved official mark or logo.
- The Columbia University crown may not be stretched, condensed, rendered in a pattern, or otherwise manipulated in any way.
- In producing graphics for use on social media and merchandise, all Alumni Groups should obtain prior approval from the CAA to ensure they are appropriately representing the University and CAA style guide requirements.
- Alumni Groups are permitted to produce merchandise for resale *only* in the context of sponsoring an event or for a limited-time fundraiser (seasonal, holiday, etc.).
- For general Alumni Group merchandise, each Alumni Group should include promotion in overall communications (i.e. newsletter) and not send more than 2-4 stand-alone emails per calendar year promoting the sale of merchandise.
- All event-specific merchandise should be included in the event-related emails (save the date, invites, thank you, survey). No stand-alone promotional emails should be sent for event-specific merchandise.
- Please plan ahead. Be aware that orders for certain merchandise can have long lead times for design and production at certain times of the year. Therefore, it is important that Alumni Groups allow for ample lead time related to CAA and University approval, and vendor related-design, production, and shipping requirements.

If you have any questions, please do not hesitate to contact us at:

caaalumnirelations@columbia.edu



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