

UNIVERSITY OF GEORGIA

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# AFFINITY GROUP LEADERSHIP COUNCIL HANDBOOK

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ALUMNI ASSOCIATION



UNIVERSITY OF  
**GEORGIA**  
Alumni Association

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## LETTER FROM THE EXECUTIVE DIRECTOR



Young Alumni Leadership Council (and alumni relations staff) at annual Young Alumni Night at Sweetwater event.



Alumni have always been a vital part of the University of Georgia's success – even founding the UGA Alumni Society in 1834. Such dedicated individuals have helped the Alumni Society, now the UGA Alumni Association, carry on a tradition of engagement, inclusiveness and service at their alma mater.

The University of Georgia counts on the support of alumni volunteers in order to fulfill its mission to enhance the academic excellence, best interests and traditions of UGA and the more than 300,000 alumni worldwide. Therefore, affinity group leaders like you are the lifeblood of our organization. Your efforts in bringing UGA to your communities provide our alumni, their families and other university supporters with opportunities for networking, friendship-building and remaining active with Georgia's flagship institution of higher learning.

We are pleased to provide you with this handbook to assist in your alumni relations efforts. Please share it with your fellow officers and board members, and refer to it when planning affinity group activities throughout the year. Of course, in addition to this handbook, the UGA Alumni Association staff is always on hand to support you in your endeavors.

Together, our efforts aim to encourage fellow graduates to connect with the university and with one another, to hire fellow grads or assist in professional development opportunities when possible, and to give back to the areas of the university that mean the most to them. I appreciate all that you do to help with these endeavors. Your loyalty is appreciated and your contributions are a key component to the continued success of your alma mater.

We look forward to working with you,

**Meredith Gurley Johnson (BSFCS '00, MED '16)**  
Executive Director



# ABOUT THE UNIVERSITY OF GEORGIA

## UGA MISSION STATEMENT

*The University of Georgia, a land-grant and sea-grant university with statewide commitments and responsibilities, is the state's oldest, most comprehensive and most diversified institution of higher education. Its motto, "to teach, to serve and to inquire into the nature of things," reflects the university's integral and unique role in the conservation and enhancement of the state's and nation's intellectual, cultural and environmental heritage.*

## UGA CORE CHARACTERISTICS

*The University of Georgia shares with the other research universities of the University System of Georgia the following core characteristics:*

- a statewide responsibility and commitment to excellence and academic achievements having national and international recognition;
- a commitment to excellence in a teaching/learning environment dedicated to serving a diverse and well-prepared student body, to promoting high levels of student achievement, and to providing appropriate academic support services;
- a commitment to excellence in research, scholarship, and creative endeavors that are focused on organized programs to create, maintain, and apply new knowledge and theories; that promote instructional quality and effectiveness; and that enhance institutionally relevant faculty qualifications;
- a commitment to excellence in public service, economic development, and technical assistance activities designed to address the strategic needs of the state of Georgia along with a comprehensive offering of

continuing education designed to meet the needs of Georgia's citizens in life-long learning and professional education;

- a wide range of academic and professional programming at the baccalaureate, master's, and doctoral levels.

With its statewide mission and core characteristics, the University of Georgia endeavors to prepare the University community and the state for full participation in the global society of the twenty-first century. Through its programs and practices, it seeks to foster the understanding of and respect for cultural differences necessary for an enlightened and educated citizenry. It further provides for cultural, ethnic, gender, and racial diversity in the faculty, staff, and student body. The University is committed to preparing the University community to appreciate the critical importance of a quality environment to an interdependent global society.



# ABOUT THE UGA ALUMNI ASSOCIATION

## ALUMNI ASSOCIATION MISSION STATEMENT

*The UGA Alumni Association advances the academic excellence, interests and traditions of Georgia's flagship university by inspiring engagement through relevant programming, enhanced connections and effective communications.*



## ALUMNI ASSOCIATION VISION STATEMENT

To be the heart of the University of Georgia creating meaningful connections for lifelong engagement and support of the UGA family worldwide.

## 3 POINTS OF EMPHASIS

### ✕ CONNECT

Our events and programs seek to help graduates connect with fellow graduates and UGA.

### ✕ HIRE

UGA grads and students make great employees! We seek to promote our graduates and provide career assistance using a number of different programs and services.

### ✕ GIVE

Annual donations from alumni provide scholarships and other support for all aspects of UGA.

## THE PILLARS OF THE ARCH

As members of the University of Georgia community, we aspire to uphold the principles manifested in the three Pillars of the Arch: **Wisdom, Justice and Moderation**

- **Wisdom** challenges us to apply lessons received inside and outside the classroom to our everyday lives. Wisdom transcends knowledge, embracing curiosity, discovery and expression throughout our community.
- **Justice** leads us to be fair in our dealings, accountable for our actions, responsible for ourselves and empathetic for others. Justice requires honesty and celebrates diversity, establishing credibility and integrity for our community and ourselves.
- **Moderation** compels us to act with civility, bolstering our faith in others and the faith others have in us. Moderation accentuates our self-respect, promotes responsible citizenship and enhances pride in our university.

Without each of these pillars, the Arch would lose its strength and balance. Likewise, all three qualities are necessary for us to be strong and complete citizens.

# CONTACT INFORMATION

## UGA ALUMNI ASSOCIATION

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# AFFINITY GROUPS AT UGA

The University of Georgia Alumni Association strives to connect students with alumni, and serve all of its alumni in the best ways possible. The UGA Alumni Association is proud to offer programming for some of the university's most dynamic populations, including students and distinct affinity groups. Currently, the UGA Alumni Association supports three affinity groups: **UGA Black Alumni, Women of UGA and Young Alumni**. These groups nurture a welcoming community for these specific populations encouraging meaningful connections. Each graduate's experience at the University of Georgia is unique, and affinity groups create bridges between the student and alumni experiences.

All UGA alumni automatically become members of the Alumni Association upon graduation. Any UGA graduate whose interests are aligned with those of the UGA Alumni Association and its affinity groups are encouraged to join and attend programs.

## UGA BLACK ALUMNI

### ✕ OVERVIEW

Many organizations and groups seek to connect black alumni and students, and this affinity group is another opportunity for those important interactions. The UGA Black Alumni Affinity Group connects alumni and students with shared experiences to continue building a welcoming and supportive campus community. Some of UGA Black Alumni's signature programs include: homecoming tailgate and ticket block, brunch & learn, and celebration of the anniversary of desegregation. The Black Alumni Affinity group also partners with the Office of Undergraduate Admissions, Office of Institutional Diversity and scholarship fundraising through the 1961 Club giving society.

### ✕ MISSION

**Recruit:** Facilitate programs and partnerships that support the recruitment of black students, faculty, and staff to the university.

**Retain:** Support students to completion of degree programs.

**Engage:** Connect current students and alumni with mentoring and professional development.

**Donate:** "Friendraising" and fundraising for UGA needs.

**Serve:** Act as UGA ambassadors in the community and to fellow Bulldogs.

### ✕ BLACK ALUMNI SCHOLARSHIP FUND: THE 1961 CLUB

The 1961 Club is a dedicated group of donors, named for the year of integration at Georgia, who share a passion for ensuring student success. With a gift of \$19.61, \$196.10, or \$1,961.00, any amount will make a difference. By supporting the Black Alumni Scholarship Fund, we remove barriers to education and keep the doors open for students to attain a quality education.



Black Alumni Homecoming Tailgate 2017





## WOMEN OF UGA

### ✕ OVERVIEW

The Women of UGA affinity group was established to engage university alumnae in the Metro-Atlanta and support alumnae nation-wide. Cookies and Cocoa with Hairy Dawg, Mentorship Mondays, and a number of fundraising events throughout the year are just a few of the programs and initiatives facilitated by the Women of UGA Leadership Council each year. All events and programs seek to benefit and grow the Women of UGA Scholarship Fund.

### ✕ MISSION

**Mentorship:** Create a sense of community among women with ties to UGA, allowing them to connect with one another and establish relationships.

**Programming:** Provide programming for women that develops their skills and empowers them to achieve personal and professional goals.

**Philanthropy:** Raise funds and awareness for the Women of UGA Scholarship Fund.

### ✕ WOMEN OF UGA SCHOLARSHIP FUND

Although the University of Georgia offers enrollment to students who are academically eligible, many of the most motivated, promising and gifted students cannot afford the cost of attendance. Over the course of four years, the cost of a college education can be a daunting barrier that some hard-working, deserving students simply cannot overcome. Even with access to the HOPE scholarship, Zell Miller scholarship and other financial aid, nearly half of all undergraduate students accrue \$21,000 or more in educational debt from student loans.

To make a difference in the lives of those students who come after us, Women of UGA has established a Georgia Commitment Scholarship valued at \$100,000 that is awarded to students through the Office of Student Financial Aid. Women of UGA is committed to raising funds for the Women of UGA Scholarship Fund, and recognizes that it is up to us, the women of the UGA alumni community, to help support students in their academic endeavors.



## UGA YOUNG ALUMNI

### ✕ OVERVIEW

With over 40,000 UGA graduates under the age of 40 living in the Metro-Atlanta area, the Young Alumni Leadership Council was established to engage and serve this dynamic and growing group. Throughout the year, this council plans and facilitates initiatives and events, such as UGA Young Alumni Night at SweetWater Brewing Company, and Young Alumni Trivia Night, and to connect graduates to each other and the university. This group also seeks to support and encourage alumni giving in aspects of its programming.

### ✕ MISSION

The mission of the Young Alumni Leadership Council is to create and implement young alumni programming and raise awareness of the importance of connecting and giving back to the university.

### ✕ GIVE TO YOUR PASSION INITIATIVE

In support of the “Commit to Georgia” campaign, the Young Alumni Leadership Council encourages graduates to give to an academic cause or department that speaks to their passions. The campaign specifically seeks to create and increase scholarships, enhance the learning environment, and solve the grand challenges facing the world today. Find out more about how your giving can reflect your passions at [giving.uga.edu](https://giving.uga.edu).



# AFFINITY GROUP LEADERSHIP

*A leadership council is a group of 15 graduates who guide each affinity group. These councils promote engagement, plan and facilitate events, and encourage giving within the affinity groups. To be considered for these leadership councils, members must live in Metro Atlanta. To find out how to plan affinity programming outside of Atlanta, refer to page 53.*

## COUNCIL MEMBER EXPECTATIONS

- Actively participate in at least one committee
- Help guide non-council volunteers on processes and practices of the council (support the committee chair)
- Serve as a representative, ambassador, and extension of the UGA Alumni Association at all events
- Complete annual admissions representative and fundraising training
- Attend 3 council meetings each year
- Notify secretary in advance of program/event of attendance or absence
- Actively assist in the identification and recruitment of new council members
- Donate at least \$300 annually to the UGA Foundation or other academic pursuits at UGA during term of service. Donations are due by the end of the fiscal year on June 30.
- Complete a two-year term



## OTHER GENERAL EXPECTATIONS OF COUNCIL MEMBERS AS REPRESENTATIVES OF THE UGA ALUMNI ASSOCIATION ARE AS FOLLOWS

- Support the mission and goals of the council and the UGA Alumni Association
- Serve as a representative, ambassador, and advocate of the UGA Alumni Association presenting a positive image of a graduate of the University of Georgia.
- Encourage alumni and friends to become engaged with UGA and Alumni Association activities
- Be respectful of various points of view, and collaborative with UGA volunteers, council members, faculty and staff
- Keep personal opinions and actions separate from those made as a representative of the university, alumni association and council
- Practice responsible alcohol consumption at all university sponsored events
- Communicate with alumni relations staff regarding needs, concerns and challenges

## THE UGA ALUMNI ASSOCIATION REQUESTS THAT COUNCIL MEMBERS AVOID:

- Using the position as a council member to influence decisions for personal gain or profit
- Conduct that would jeopardize the council and UGA Alumni Association's effectiveness
- Posting negative comments and/or inappropriate pictures and/or comments on websites, emails, or social media
- Sharing negative comments regarding the university or alumni association (including faculty, staff and students) on personal social media
- Acting as an official spokesperson, providing statements or opinions as they can be construed as the university's or alumni association's stance on a particular subject.
- ✗ All media requests for statements should be directed to the alumni association and the university's communication office. (Newspapers, websites, television media, radio, podcasts, etc.)

An executive board (President, Vice President, and Secretary), is elected by council members to oversee council business, especially in regards to goal and vision setting and inter-council activities.

THE JOB DESCRIPTION OF EACH EXECUTIVE POSITION IS AS FOLLOWS:

## PRESIDENT

1. Presides over all council meetings (executive committee, officers and full council)
2. Serves as the chief representative if/when requested by the UGA Alumni Association Board of Directors, school and college boards, and campus units
3. Cultivates and nurtures relationships as needed with various campus and alumni groups
  - Notifies office of alumni relations before securing meetings on campus
4. Works with alumni relations staff to secure speakers/university staff for trainings and get officer buy-in prior to setting meeting agendas
5. Reports to UGA Alumni Association staff – keeping them abreast regularly on meetings, events, and programs the council is participating in within UGA and other outside opportunities
  - Provides monthly report on council activity to alumni relations staff
6. Responsible for annual council planning
7. Oversees budget with executive committee and alumni relations staff
8. Maintains relationships with other affinity group council presidents
9. Serves as the tie-breaker in deadlocked voting situations
10. Serves a one-year term then transitions into immediate past president role for one year

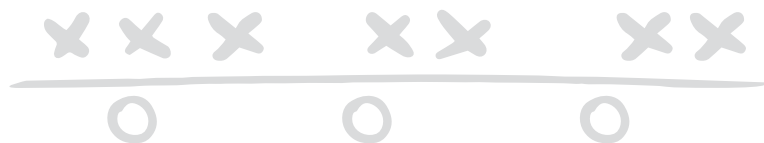
## VICE PRESIDENT

1. In the absence of the president or in the event of the president's inability to act – performs the duties of the president.
2. Works directly with committee chairs on their goal setting and achievement progress, collects committee meeting reports, and shares with officers and UGA Alumni Association staff
  - Manages committee chairs and keeps them accountable to job duties
3. Coordinates social events outside of meetings and programs for the council members to build rapport
4. Monitors committee participation and communicate with officers and alumni relations staff
5. Completes one-year term

## SECRETARY

1. Represents council in the absence or inability of the president and vice president
2. Takes minutes of each meeting and distributes to council and UGA Alumni Association staff within two (2) weeks of meeting
  - Minutes should include key decisions, action items with dates and person responsible to complete tasks
3. Sends meeting reminder emails to council
4. Shares committee reports with full council following officer approval
5. If a decision must be voted on between meetings, the secretary will distribute items for electronic vote
6. Maintains record of budget used for the council
7. Completes one-year term, renewable

The council president concludes their term and transitions into the role of Immediate Past President for an additional one-year term. This position serves as an advisor for the current council and is an ambassador of the UGA Alumni Association. The Immediate Past President has no voting privileges.





## AFFINITY GROUP LEADERSHIP COUNCIL SELECTION/TRANSITION TIMELINE

Standing committees exist within the council in order to intentionally direct council activities, including alumni outreach, fundraising, and event management. Committee chairs are elected by the council members and serve a one-year, renewable term.

### THE EXPECTATIONS OF COMMITTEE CHAIRS ARE AS FOLLOWS:

- Report to vice president
- Set annual goals for committee with vice president, alumni relations staff
- Hold monthly meetings (in person, conference call, or web conference)
  - ✗ Provide written report within one week of meeting to the vice president
- Responsible for leading at least one event or project within a calendar year
- Submit events/programs at least three (3) months in advance of event date to officers for electronic vote and approval by full council before advertising
  - ✗ Provide detailed timeline and job descriptions for events (can get assistance from alumni relations staff to create)
- Manage volunteer committee members
  - ✗ Communicates clearly, frequently via email, conference calls and committee meetings
  - ✗ Ensure they are trained appropriately and are knowledgeable about the council and specific committee responsibilities
  - ✗ Utilize committee members and volunteers as needed for staffing events led by their particular committee
- Provide committee members'/volunteers' names to vice president to be shares with full council
- Identify committee members/volunteers who would make effective leaders and/or council members

### ✗ COUNCIL VACANCIES

If a council member resigns or is removed during their term, the vacancy will be filled at the discretion of the Alumni Association staff. To fill the vacancy, a list of qualified applicants will be kept on file from the previous year's pool. It will be the typical practice that vacancies occurring after October 1 will go unfilled until the next fiscal year (July 1).

*Annually, each council welcomes 5-8 new council members and transitions members off of the council whose terms have completed. Below are the significant selection and transition target dates that take place each fiscal year (July-June).*

### ✗ JULY

- First month of fiscal year: new council members, committee chairs, and officers begin their terms

### ✗ AUGUST

- Review meetings: Staff meets with council members who have completed their first year on council to discuss the past year, future goals, and future council intentions/desires (roll off, committee chair/officer positions).

### ✗ OCTOBER-DECEMBER

- Council applications are released, promoted, and accepted until December 31

### ✗ JANUARY

- Council officer (President, Vice President, and Secretary) elections are held
- Council applications are reviewed by selection committee (Staff, AA Board members, Immediate Past President) and new council members are selected (through March).

### ✗ FEBRUARY/MARCH

- Council members attend Alumni Leadership Assembly in Athens
- New council members are announced (new council members will start July 1).

## AFFINITY GROUP COUNCIL MEETING & REPORT PROCESSES

### ✕ MARCH

- New council member orientation

### ✕ APRIL

- Transition meeting occurs– between current council members and future council members.
- Committee chair elections take place by June 1 (electronic vote)

### ✕ JUNE

- Final month of fiscal year and council term
- Annual donation commitment due by June 30

*Council meetings and committee reports keep the councils organized, informed, and focused on achieving their respective goals.*

### COUNCIL MEETINGS

Each council convenes at three meetings annually, at minimum. These meetings are held during the weekday and dates are confirmed at least 2 months in advance of each meeting. Reporting current activity, reviewing/tracking goals, proposing new events/initiatives, and working on upcoming projects are the primary purposes of these meetings. Council meeting attendance is mandatory for all council members.

Effective council meetings are vital to the organization and its ability to carry out its role. Councils follow these processes to ensure efficient meeting outcomes:

- Agenda items for the meeting should be sent to the officers at least two weeks before the meeting
- Meeting agenda and previous meeting minutes will be sent to council members one week prior
- Meeting will start on time and a time keeper will be assigned to make sure the agenda is followed
- The secretary will take minutes, noting key decisions and action items with dates and person responsible to complete tasks
- Meeting minutes will be sent to the group by the secretary within two weeks of the meeting following officer's approval



Women of UGA Leadership Council members at Cookies & Cocoa with Hairy Dawg.

## EVENTS & CHECKLISTS

### COMMITTEE MEETINGS AND REPORTS

Each month, council committees should meet for tasks discussion, future planning, and general updates. To ensure transparent and effective communication, the following practices will be used:

- Committee meetings can occur as calls or in-person.
- Meetings should be planned at a convenient time for all committee members. It is suggested that these meetings occur at the same time and date each month (i.e. the first Monday of every month at 6:00pm).
- A committee member will take the minutes noting key decisions and action items with dates and person responsible to complete tasks. Using these minutes, the committee chair will prepare a monthly report. Once completed, the monthly report should be sent to the council vice president by due date.
- It is the responsibility of the vice president to compile all the committee reports and format them into one document. Once prepared, this document is sent to the officers for review and approval.
- Once approved, the secretary distributes the monthly report to the council. It is suggested that this document is sent on the same day of each month (i.e. the first Monday of each month, last day of the month, etc.).
- It is the responsibility of the officers to communicate when committee reports are due to the vice president. Committee chairs who do not send a report will be left off the final monthly report document.
- Sometimes committees will decide they need council input on key discussions and decisions before taking next steps. These items should be sent immediately to the officers who will then follow up with the council as needed (i.e. setting up a vote).

*Engagement is a core tenant of each affinity groups' mission. While engagement can take many forms, planning and facilitating events and programs is a tangible way councils fulfill and support this aspect of their mission.*

Two event processes must take place to ensure the facilitation of a successful program: Event Concept Development and Event Planning.

### EVENT CONCEPT DEVELOPMENT

Before an event or program can take shape, the council must research, develop, and present their event concept to the UGA Alumni Association. Here are some questions to consider when developing a new event concept:

- Does the event or program fit the mission of the UGA Alumni Association and the affinity group?
- What is the budget for the event or program (expenses, revenues, and donations)?
- What are the event or program venue options?
- Who is the event or program audience? What need is this event or program fulfilling?
- When is the event or program?
- Does this event or program conflict with other UGA Alumni Association or affinity group programming?







## EVENT PLANNING

Once an event has been approved by the council and University staff the lead committee can begin to plan the event.

The first step in the event process is to set up a committee meeting/call with the UGA Alumni Association staff. This will help the committee members further define event needs, logistics, and processes.



## IMPORTANT EVENT REMINDERS

### ✗ CONTRACTS

Contract negotiations and signatures must be handled by the UGA Alumni Association. This process prevents council members from becoming personally liable for the contract and ensures proper use of the UGA Foundation funds.

### ✗ EVENT GIVEAWAYS

Councils can choose to give away door prizes for free at events to every participant. Councils are not to hold raffles or other “games of risk/chance” at events. The UGA Alumni Association serves a liaison between schools, colleges, departments and units for prizes when necessary.

### ✗ ALCOHOL POLICY

All council events must follow the official UGA alcohol policy. To review the complete alcohol policy, please visit the UGA website.

#### IMPORTANT TIPS TO REMEMBER:

- Do not include references to alcoholic beverages in advertising.
- Do not serve alcohol to any individual under 21 years of age.
- A hired bartender must serve any/all alcohol.
- Ensure food and non-alcoholic beverages are available to attendees.

### ✗ FINANCES

- Council members must never accept cash on behalf of the council or the UGA Alumni Association.
- Councils are not permitted to hold private banking accounts.

### ✗ GUEST SPEAKERS

- Councils are able to work with UGA Alumni Association staff to coordinate guest speakers and panels at their events and programs.



## IN-KIND DONATIONS FOR EVENTS:

Councils are able to ask local businesses, companies and/or individuals to help offset costs for a council event. Local companies may want to provide door prizes, event supplies, or event space. In return for providing these donations, they are able to receive in-kind gift recognition from the UGA Foundation (UGAF).

The UGA Foundation can accept in-kind donations as long as the donations are consistent with the mission of the university. To transmit a gift, the individual or vendor must complete a Deed of Gift Form to irrevocably transfer ownership to UGA. Upon receipt of the appropriate documentation, the UGA Gift Accounting staff will issue a gift receipt describing the item(s) donated. For gifts exceeding \$5,000, the individual or vendor should provide an independent appraisal and an IRS Form 8283. The UGAF will return the signed 8283 with the receipt.

- For Gift in Kind credit, an individual must fill out the UGA Deed of Gift Form online: [goo.gl/oxGBhi](http://goo.gl/oxGBhi)
- Please contact an Alumni Association staff member for more details about Gift in Kind donations



## REIMBURSEMENT PROCEDURES

Materials and supplies for council business should be purchased by UGA Alumni Association staff whenever possible. In the event volunteer purchase and reimbursement is the only option, purchases should first be communicated to UGA Alumni Association staff. It is important to note that reimbursements may take three to four weeks to process. To be reimbursed by UGA, an individual must fill out a W9 (which requires your social security number): [irs.gov/pub/irs-pdf/fw9.pdf](https://irs.gov/pub/irs-pdf/fw9.pdf).

An individual must also fill out an honorarium: [busfin.uga.edu/forms/non\\_emp\\_payment.pdf](https://busfin.uga.edu/forms/non_emp_payment.pdf).

Individuals will be required to provide a copy of the paid receipt showing a zero balance. If an event involves reimbursement for food or drinks, a list of attendees must be provided.

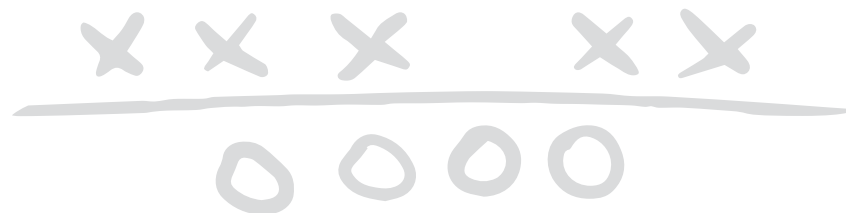
Council members and committees can utilize the following resources to organize and plan council events:

- **Event Timeline Norms** – a general and macro-level event timeline
- **Event Management Checklist** – a detailed and micro-level event timeline



## EVENT TIMELINE NORMS

- **8+ months in advance at Yearly Planning Meeting**
  - ✗ Submit ideas for events at yearly planning meeting
- **5 months in advance**
  - ✗ Event kick-off meeting with UGA Alumni Association staff
- **4+ months in advance**
  - ✗ Date confirmed
  - ✗ Location Chosen
  - ✗ Use of funds voted on by Council
  - ✗ Submit all contracts to be signed
- **6 to 8 weeks in advance**
  - ✗ Save the Date included on Alumni Calendar
  - ✗ Social Media images used to personally promote event
  - ✗ Orders needed for event confirmed with staff
- **4 to 6 weeks in advance**
  - ✗ Registration Opens
  - ✗ All event details and orders confirmed
  - ✗ Council volunteer sign up
- **Sent 1-2 days in advance**
  - ✗ Reminder email sent to registrants
  - ✗ Final timeline with assignments sent to volunteers
- **With 2 weeks following the event**
  - ✗ Follow up email
  - ✗ Thank those who gave in addition to mandatory gift





## EVENT MANAGEMENT CHECKLIST

### ✕ 8 MONTHS (32 WEEKS) PRIOR

Task	Comments	Completed
Submit ideas for events at yearly planning meeting.	Consider your audience. Does your event fall into at least one of these categories? <ul style="list-style-type: none"> <li>• Alumni Connect/Social</li> <li>• Academic Interest</li> <li>• Professional Development/Networking</li> <li>• Student Focused</li> <li>• Service</li> <li>• Fundraising</li> </ul>	

### ✕ 5 MONTHS (20 WEEKS) PRIOR

Task	Comments	Completed
Event kick-off meeting with UGA Alumni Association Staff	Discuss event plans in their entirety <ul style="list-style-type: none"> <li>• Date and time</li> <li>• Venue</li> <li>• Audience</li> <li>• Event programming</li> <li>• Event needs</li> <li>• Communications</li> </ul>	
Create timeline, delegate duties		



### ✕ 4 MONTHS (16 WEEKS) PRIOR

Task	Comments	Completed
Select date and time	<ul style="list-style-type: none"> <li>• Ensure hosts, VIPs and/or speakers are available for specified dates (work with admin assistants when necessary)</li> <li>• Consult campus calendar/religious calendars when selecting</li> <li>• Think of campus culture/workday schedule when selecting times</li> <li>• Keep in mind federal and state holidays</li> </ul>	
Select and reserve venue	Remember to review: <ul style="list-style-type: none"> <li>• Will you need a rain plan?</li> <li>• A/V capabilities</li> <li>• Parking availability/restrictions</li> <li>• Maximum capacities</li> <li>• Other events occurring near space – will they conflict?</li> <li>• Accessibility</li> <li>• Access times to space</li> <li>• Load-in/delivery capabilities</li> <li>• Included equipment with room rental</li> <li>• Security issues</li> </ul>	
Develop Budget	<ul style="list-style-type: none"> <li>• Determine what funds will be used and put it to a vote</li> <li>• Research potential funding sources. Could you collaborate with any other departments/entities?</li> </ul>	
Determine guest list	<ul style="list-style-type: none"> <li>• List guests, including program participants and key stakeholders.</li> <li>• Confirm any special needs</li> </ul>	
Develop communications plan and submit to DARComm	<ul style="list-style-type: none"> <li>• What is your event's main message?</li> <li>• Determine what and when communications will be sent</li> <li>• Create effective channels to communicate with your team/vendors</li> <li>• Remember to include all print, web, social media, collateral, signage, and online elements</li> <li>• For social media help/questions, ask your staff contact</li> </ul>	



#### ✕ 4 MONTHS (16 WEEKS) PRIOR (CONTINUED)

Task	Comments	Completed
Research potential vendors	<ul style="list-style-type: none"> <li>When selecting a new vendor for an expense over \$10,000, begin the open bid process</li> <li>Remember, sometimes venues have preferred vendors who will discount your rental rate when used</li> </ul>	
Submit all contracts to be signed		

#### ✕ 8-12 WEEKS PRIOR

Task	Comments	Completed
Reserve hotel, plane and travel accommodations for speakers/VIPs and staff, if applicable	<ul style="list-style-type: none"> <li>Ensure hotel room blocks have multiple options and are accessible for guests</li> <li>Thoroughly review hotel contract for attrition clauses</li> </ul>	
Secure vendors	<ul style="list-style-type: none"> <li>Entertainment/musicians</li> <li>Caterer</li> <li>Décor</li> <li>A/V</li> </ul>	
Send Save-the-Dates		
Send preliminary volunteer requests	Consider asking: <ul style="list-style-type: none"> <li>Student Alumni Association</li> <li>Other affinity groups</li> <li>Nearby alumni chapter</li> </ul>	
Review printed materials with DARComm		

#### ✕ 8-12 WEEKS PRIOR (CONTINUED)

Task	Comments	Completed
Set menu with caterer – know that you can confirm the final head count approx. a week prior to the event	<ul style="list-style-type: none"> <li>Ask if there's a surcharge for late additions</li> </ul>	
Determine if awards/trophies will be given and research companies		
Determine any giveaways	<ul style="list-style-type: none"> <li>Visit the Licensing and Trademarks website for policies</li> <li>Consider partnering with others to share costs</li> <li>Do not include a date, if possible, so item can be reused</li> </ul>	

#### ✕ 6-8 WEEKS PRIOR

Task	Comments	Completed
Assemble/address invitations		
Create RSVP tracking system		
Mail invitations	<ul style="list-style-type: none"> <li>Set RSVP 1.5-2 weeks (at minimum 1 week) prior to event date</li> <li>Update website with RSVP info.</li> </ul>	
Communicate all things needed to be ordered with staff	<ul style="list-style-type: none"> <li>Awards</li> <li>Promo Items</li> <li>Literature, etc.</li> </ul>	

## ✕ 6-8 WEEKS PRIOR (CONTINUED)

Task	Comments	Completed
Social Media exposure	<ul style="list-style-type: none"> <li>Personally promote event within your networks</li> </ul>	
Finalize transportation logistics for VIPs and out-of-town guests		

## ✕ 4-6 WEEKS PRIOR

Task	Comments	Completed
Registration Opens		
Confirm staff/volunteers for each aspect of the event		
Confirm all event details and orders	<ul style="list-style-type: none"> <li>Awards</li> <li>Catering</li> <li>Décor</li> <li>Promo items</li> <li>Security</li> <li>Travel arrangements</li> </ul>	



## ✕ 1-2 WEEK(S) PRIOR

Task	Comments	Completed
Follow-up with RSVP list	<ul style="list-style-type: none"> <li>Make personalized phone calls &amp; emails, if necessary</li> </ul>	
Send final numbers to vendors and venue		
Create seating plans and room diagrams for assistance with set-up and day-of-event questions	<ul style="list-style-type: none"> <li>Ensure you follow correct protocol for head table seating</li> <li>Create place cards for seated, if needed</li> <li>Ensure you have back-up seating options available for changes within head table seating arrangements</li> </ul>	
Develop photo shot list		
Create day-of timeline	<ul style="list-style-type: none"> <li>Detailed hour-by-hour agenda for key volunteers/vendors</li> </ul>	

## ✕ 1-2 DAYS PRIOR

Task	Comments	Completed
Ensure all appropriate contacts' info is listed where you can easily retrieve it	<ul style="list-style-type: none"> <li>Recommend adding to your phone for easy text ability</li> </ul>	
Recheck all equipment/materials to ensure nothing is damaged, quantity is correct, etc.		
Pack materials needed	<ul style="list-style-type: none"> <li>See packing list.</li> </ul>	

### ✕ 1-2 DAYS PRIOR (CONTINUED)

Task	Comments	Completed
Send email containing briefing, final timeline, and scripts to participants	<ul style="list-style-type: none"> <li>• Be sure to include rain plan logistics</li> <li>• Recommend printing copies to have on site</li> </ul>	
Send Reminder Email to Registrants		

### ✕ DAY OF EVENT

Task	Comments	Completed
Arrive early and do one last walk-through		
Oversee all set-up		



### ✕ WITHIN 2 WEEKS AFTER EVENT

Task	Comments	Completed
Send thank you note/email to those who donated in addition to the built in gift.		
Handle lingering invoices		
Hold post-event meeting with key players to evaluate event	<ul style="list-style-type: none"> <li>• Complete a post-event evaluation to record your ideas and lessons learned</li> </ul>	
Send follow up email	<ul style="list-style-type: none"> <li>• Thank you for attending</li> <li>• Link to pictures of the event</li> <li>• Link to survey</li> </ul>	
Book next year's venue, for annual event		





# AFFINITY GROUP COUNCIL FINANCES, BUDGETS, & FUNDRAISING

*To be most effective, council members should familiarize themselves with policies and practices regarding council finances, budgets, and fundraising.*

## ALUMNI ASSOCIATION/AFFINITY GROUP COUNCIL FINANCES

The UGA Alumni Association is considered a nonprofit organization under Federal regulation 501(c)(3) – Organizations for the Advancement of Education. Affinity Groups are considered nonprofit and operate under the alumni association’s nonprofit status. Neither the UGA Alumni Association nor the affinity groups are tax exempt and must pay sales taxes per IRS guidelines.

### IMPORTANT FINANCIAL NOTES

- All budgets and funds to operate for the fiscal year are provided by the UGA Foundation.
- The fiscal year runs from July 1 to June 30.
- Only Alumni Relations and Development Gift Accounting may issue tax receipts on behalf of The University of Georgia.

## AFFINITY COUNCIL BUDGETS

It is the responsibility of the council to assist staff members with the preparation of the council budget, especially concerning council events. Once budget decisions are made, staff members will create budget for events and an official budget to be submitted and approved by the UGA Foundation. The budget for a fiscal year is submitted the January/February before it goes into effect (i.e. Fiscal Year 2019’s budget (July 2018–June 2019) is submitted January/February 2018).

## ✕ AFFINITY COUNCIL BUDGETS INCLUDES THREE PARTS:

**Expenses:** Line items in which the council spends funds, including event expenses, operation and meeting expenses, campus partnership expenses, etc.

**Revenues:** Line items in which the council receives funds, typically through event registrations. These funds go back to the UGA Foundation.

**Donations:** Funds received by the council to support scholarships and other UGA funds (See Fundraising section). These are typically not reflected in the budget that is presented to the UGA Foundation, but are noted in event BFDs (Budget Finance Development forms).

Budget line items are assigned to specific committees at the beginning of the fiscal year. Unassigned line items must be voted on by council and assigned as needed. Any remaining funds in a budget line following the event will be moved to the UGA Alumni Association contingency fund.

## AFFINITY COUNCIL FUNDRAISING

An important aspect of each affinity group council’s mission is to support their designated scholarship or giving initiative. The council most often achieves this goal through intentional and strategic fundraising efforts led by its fundraising committee. It is important to remember that all fundraising efforts should be discussed with and approved by the council’s designated university staff person.

### FUNDRAISING METHODS THAT ARE OR HAVE BEEN UTILIZED BY COUNCILS

- Designating a portion of event registration fees to the scholarship or giving initiative
- Percentage events where a vendor gives a percentage of sales to the scholarship or giving initiative.
- Georgia Funders
- In-Kind sponsorships/gifts

# UNIVERSITY OF GEORGIA POLICIES & PROCEDURES

- Social media campaigns
- Letter writing initiatives
- Hosting “giving” events

## FUNDRAISING EFFORTS SHOULD

- Be discussed with and approved by university staff representative
- Fit within the mission and strategic plan of the council
- Take place through the university’s giving portal, if possible, to assure appropriate tracking and gift receipting
- Be followed by the appropriate forms of stewardship (i.e. event recognition, thank you letters, etc.)

## THINGS TO NOTE IN REGARDS TO FUNDRAISING

- Raffles are not permitted.
- Online sales through platforms, such as PayPal, and credit card sale using platforms, like Square, are not permitted.
- Applying for outside grants is not permitted.
- Sponsorships are not permitted for events hosted on campus.
- If you would like to pursue outside sources of sponsorship, please talk with your staff contact before you approach any prospective donors/sponsors. We will work with you to secure approval to contact your potential donors and to ensure that you have the greatest chance of success.
- Efforts that overlap with the Alumni Associations business/priorities should gain written approval from the Alumni Association (i.e. accepting corporate support, funding from academic departments, scholarship creation, etc.)

## SCHOLARSHIP FUNDS:

- Some affinity groups have scholarships that are maintained through the University. Scholarship statements can be provided by UGA Alumni Association staff per request.

*The University of Georgia abides by all policies set forth by the University Systems of Georgia. As an extension of the University of Georgia through the Alumni Association, affinity group councils are expected to abide by these policies. University System of Georgia policies can be found at [usg.edu/policies](https://usg.edu/policies).*

## ✗ SOCIAL MEDIA POLICIES

All electronic communications are subject to the policies below. Familiarize yourself with and abide by these policies when posting online.

- Copyright
- The Family Educational Rights and Privacy Act
- Privacy Policy
- Use of Computers
- Information Classification Standard
- Logo Policy

## ✗ GENERAL POLICIES

- Affirmative Action/Equal Opportunity
- Alcohol & other drugs
- Copyright and Trademarks
- Non-discrimination & anti-harassment
- Reimbursement Policy
- Media Inquiry Policy

If a council member has a question about any university policies, they should not hesitate to ask a staff member for help and/or clarification.

# ALUMNI ASSOCIATION SIGNATURE EVENTS



## BULLDOG 100



✕ **ESTABLISHED: 2010**

### ✕ **PROGRAM**

The UGA Alumni Association's Bulldog 100 annually recognizes the 100 fastest-growing businesses owned or operated by UGA Alumni. As selection is based on annual growth, the list includes companies ranging in various sizes and industries. Several different areas of the country are represented on the list each year.

### ✕ **FUNDRAISING COMPONENT**

#### THE MICHAEL J. BRYAN AWARD AND SCHOLARSHIP

The Michael J. Bryan Award is awarded to a returning Bulldog 100 honoree who demonstrates entrepreneurial spirit and whose business has sustained growth. In addition, donations made to the Michael J. Bryan Bulldog 100 Scholarship Fund will support need-based scholarships for students.

### ✕ **CRITERIA**

Companies will be ranked based on compounded annual growth rate for the three years prior to the event. All qualified businesses, regardless of location, are encouraged to participate.

TO BE CONSIDERED FOR THE 2019 BULLDOG 100, BUSINESSES MUST MEET THE FOLLOWING REQUIREMENTS:

- Been in business for more than five years.
- Have verifiable revenues of \$100,000 or more in the previous year.
- The CEO, president, managing partner or owner must be a former UGA student. The owner, a former UGA student, must own at least 50 percent of the business.
- Operate in a manner consistent with the Pillars of the Arch and in keeping with the values and image of the University of Georgia.

*\* The UGA Alumni Association reserves the right to verify that nominees meet the criteria and reserves the right, in its sole discretion, to reject any nominee for any reason.*

**Nominations Accepted:** January – June

**Bulldog 100 Notified:** November of every year

**Celebration:** Late January – Early February





## 40 UNDER 40



✕ **ESTABLISHED: 2011**

✕ **PROGRAM**

The UGA Alumni Association's 40 Under 40 recognizes those alumni who are leading the way in business, leadership, community, educational and/or philanthropic endeavors. By choosing from nearly 500 nominations, the program recognizes forty outstanding graduates under the age of forty.

✕ **CRITERIA**

Making an impact in business, leadership, community, educational and/or philanthropic endeavors; aspiration to uphold the Pillars of the Arch: wisdom, justice, and moderation; and demonstrating dedication to UGA and its mission of teaching, research, and service.

- Earned an undergraduate or graduate degree from UGA
- Is under 40 as of September 1 of the year of the program
- Is willing to submit a headshot, if selected, that can be published by units within the University of Georgia
- Aspires to uphold the principles manifested in the three Pillars of the Arch
- Demonstrates a commitment to maintaining a lifelong relationship with UGA
- Has made an impact in their professional and philanthropic endeavors

*\* The UGA Alumni Association reserves the right to verify that nominees meet the criteria and reserves the right, in its sole discretion, to reject any nominee for any reason. Self-nominations are not accepted.*

**Nominations Accepted:** January – April

**Nominees Application Period:** April

**Nominee & Past Honoree Gathering:** Mid-June

**40 Under 40 Notified:** July

**Awards Luncheon:** September





## **ALUMNI AWARDS LUNCHEON**



**✕ ESTABLISHED: 1937**

### **✕ PROGRAM**

The UGA Alumni Association annually recognizes those alumni, faculty, and friends who have demonstrated outstanding loyalty and service to the University of Georgia. With this recognition, the Alumni Association expresses its deep appreciation and admiration to people who bring distinction and honor to the University of Georgia.

## **✕ AWARDS**

### **THE ALUMNI MERIT AWARD**

The Alumni Merit Award is presented to individuals who bring recognition and honor back to the University of Georgia through outstanding leadership and service to the University, the community, and his or her profession. The honoree, in deed or action, reflects and recognizes the importance of his or her education at the University, demonstrates pride in their alma mater, and shows a continued interest in UGA. The recipient must have attended the University of Georgia.

### **THE FACULTY SERVICE AWARD**

The Faculty Service Award is presented to current or former faculty or staff who have demonstrated loyalty and service to the University of Georgia through outstanding leadership in higher education.

### **THE YOUNG ALUMNI AWARD**

The Young Alumni Award is presented to individuals who bring recognition and honor back to the University of Georgia through outstanding leadership and service to the University, the community, and his or her profession. The honoree, in deed or action, reflects and recognizes the importance of his or her education at the University, demonstrates pride in our alma mater, and shows a continued interest in UGA. The recipient must have attended UGA within the past 10 years.

### **THE FAMILY OF THE YEAR AWARD**

The Family of the Year Award is presented to a family who demonstrates a history of loyalty to UGA. They bring recognition and honor back to the University of Georgia through outstanding leadership and service to the University and the community at large.

### **THE FRIEND OF UGA AWARD**

The Friend of UGA Award is presented to any non-alumnus or organization who has devoted themselves to the greater good of the University of Georgia.

**Awards Luncheon:** April



## FOUNDERS WEEK

## FOUNDERS WEEK

*Celebrating the birthplace of public higher education in America*



✕ **ESTABLISHED: 2009**

### ✕ **PROGRAM**

In recognition of the University's anniversary as the nation's first state-chartered institution of higher education, the UGA Alumni Association and the Student Alumni Association host a week-long celebration. The highlight of the week is the annual Founders Day Lecture, hosted in partnership with the Office of the President, Provost's Office and UGA Emeriti Scholars. The lecture is held in the UGA Chapel and has become a Founders Day tradition, drawing alumni, students, faculty, esteemed guests and members of the community.

✕ **DATE: THE WEEK OF JANUARY 27TH, ANNUALLY.**

See [alumni.uga.edu/foundersweek/](http://alumni.uga.edu/foundersweek/) for additional information.



## ALUMNI WEEKEND



✕ **ESTABLISHED: 2019**

### ✕ **PROGRAM**

The UGA Alumni Association, in partnership with and other campus entities, provide a weekend of programming for alumni and friends of the university to relive their days as a UGA student. Programming is a mix of classes, free time for fun activities, and time with fellow alumni. It culminates in a brunch on Saturday.

✕ **DATE: MARCH**

See [alumni.uga.edu/weekend/](http://alumni.uga.edu/weekend/) for additional information.

# FREQUENTLY ASKED QUESTIONS FOR UNIVERSITY AMBASSADORS

## GENERAL

### How can I update my contact information?

Update your information by selecting Update Your Info at [gail.uga.edu](http://gail.uga.edu) or clicking Update Profile, found at the bottom of the main [alumni.uga.edu](http://alumni.uga.edu).

### I've received updated contact information from a fellow alum. How can I update their information?

Please contact us and we will begin the verification process to ensure their UGA alumni profile is up to date.

### How can I get in touch with another alumna/us?

The Alumni Association is not able to provide contact information of alumni. Alumni can search for fellow alumni using the Alumni Portal function at [gail.uga.edu](http://gail.uga.edu) and signing in.

### How do I become a member of the UGA Alumni Association?

All UGA graduates are “members” of the UGA Alumni Association and no dues are required.

### What career services do you offer to alumni?

The UGA Career Center and UGA Alumni Association are partners in providing resources to help alumni find meaningful careers! Visit the UGA Career Center page for additional information at [career.uga.edu/alumni/alumni](http://career.uga.edu/alumni/alumni).

### I'm a student. What opportunities are available for me?

Students have an opportunity to get involved with the UGA Alumni Association while still enrolled at UGA. Students are encouraged to join the Student Alumni Association and seniors are encouraged to make a Senior Signature gift of \$50. Learn more at [alumni.uga.edu/students/](http://alumni.uga.edu/students/)

## CHAPTERS/AFFINITY GROUPS

### What is the chapters program and how do they intersect with affinity groups?

Chapters and affinity groups are groupings of University of Georgia alumni and friends (including parents, fans, etc.) that connect with each other in support of UGA. They are approved by the UGA Alumni Association and receive recognition and benefits associated with groups that support the mission and strategic focus of the UGA Alumni Association and the Institute. Chapters are location-based and unite alumni and friends from a specific region, whereas affinity groups are interests-based and unite alumni and friends with similar backgrounds, experiences, or passions in the Metro-Atlanta area.

Chapters may choose to do their own affinity group programming in their area. These affinity events/programs are run through the local chapter and their budget. However, chapters and affinity representatives can look to the Metro-Atlanta based Affinity Group Councils for insight as they plan their events/programs. Direct individuals to their local chapter (outside of Metro-Atlanta) if interested in affinity group programming.



## EVENTS

### How can I learn about upcoming chapter/affinity group events?

You can view our full calendar of events for details on upcoming opportunities. We also recommend viewing your particular network's or group's page directly for more information about upcoming events and links to their social media pages for more opportunities to engage with fellow alumni.

## What type of events should our chapter/affinity groups be hosting?

Each chapter and affinity group hosts events unique to the interests of their target audience. We encourage chapters and affinity groups to offer a variety of opportunities, using our focus areas as guidance. Our focus areas are:

- Alumni Connect/Social
- Academic Interest
- Professional Development or Networking
- Student Focused
- Service
- Fundraising

Here are just a few examples of what has worked for some chapters and affinity groups in the past:

- Student Send-offs
- Networking and Professional Development events
- Community Service/Volunteer Days
- Fundraisers for affinity group scholarships



## COMMUNICATIONS

### How can we send an email to our listserv?

If you do not have your Leadership Council listserv address, a UGA Alumni Association staff person can provide that for you. Please only send council related e-mails on the listserv.

### Where can I find the social media handles of a specific university groups?

The University of Georgia has many social networks that you can stay connected with. Visit the UGA Social Media on Campus page for a list of the UGA school, college, and division's social media handles.

## How can we post to social media?

Your council likely has at least one type of social media page (Instagram, Facebook, Twitter, LinkedIn, etc.) – these pages are managed and operated by a council member, typically someone on the outreach committee.




### UGA BLACK ALUMNI

		
ugablackalumni@uga.edu	ugablackalumni	UGA Black Alumni

### UGA YOUNG ALUMNI

		
youngalumni@uga.edu	ugaalumniassoc	UGA Alumni Association

### WOMEN OF UGA

		
womenofuga@uga.edu	womenofuga	Women of UGA

## Is there a way to change my communication preferences?

Yes! Alumni can choose to receive email communication from multiple networks or discontinue communication from specific departments by editing your communication preferences. Go to [uga.edu/myid](https://uga.edu/myid) and update your information and preferences.



## DONATIONS/FUNDRAISING

### I want to donate – what kinds of donations can I make?

Make a gift by going to [gail.uga.edu/give](https://gail.uga.edu/give) and specify the fund you would like to give to. Click here if you would like to find out more information regarding other ways to give (i.e. by mail, by phone, stock transfer, etc).



# UGA ALUMNI ASSOCIATION

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