UGA® ALUMNI

PLAYBOOK

**University of Georgia
Alumni Association**

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LETTER FROM THE EXECUTIVE DIRECTOR

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, chapter 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 chapter 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 A. Johnson

Meredith Gurley Johnson (BSFCS '00)
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 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.

✗ UGA 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.

⚔ 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 Us

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ALUMNI CHAPTER RESOURCES
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✗ Online Resources

○ Chapter Leader Resources web page:

The online Chapter Leader Resources web page has additional information and helpful forms that will be useful to you as a chapter leader. These resources include best practices from other chapters and webinars throughout the year, so be sure to check this page for updates periodically. Found online at alumni.uga.edu

○ UGA Chapter Leaders Facebook group:

This Facebook group is a great networking tool for chapter leaders around the world. Chapter leaders use this space to share updates, pictures and ideas that have been successful with their chapters and network with each other. If you have difficulty accessing this group, please email Alumni Association staff for assistance. Found online at facebook.com/groups/UGAChapterLeaders

WHAT IS AN ALUMNI CHAPTER?

UGA alumni chapters exist to connect alumni, promote the University of Georgia and the UGA Alumni Association around the world and to strengthen ties between alumni and their communities. Managing an alumni chapter is a big responsibility and requires the efforts of multiple board members working together in order to be truly successful. Chapters come in two types: Pillar chapters and Arch chapters. Each chapter is free to select the level of involvement and responsibility that best suits their needs.

Chapter Expectations

	Pillar Chapters	Arch Chapters
Board	Must have a president. Chapter leaders are invited to attend the annual Alumni Leadership Assembly.	Must have a president and a vice president. Recommended to not exceed a board of 10 to 12 members. At least one board member must attend the annual Alumni Leadership Assembly.
Application	Chapter president must submit a Chapter Charter Application each year. Chapter president must sign a Memorandum of Understanding outlining the expectations of chapter leader, chapter social media and chapter listserv conduct.	Chapter president must submit a Chapter Charter Application each year, as well as a Mid-Year Update. All chapter leaders must sign a Memorandum of Understanding outlining the expectations of chapter leader, chapter social media and chapter listserv conduct.

	Pillar Chapters	Arch Chapters
Events	Must host events and/or game watching parties.	Must host at least six events from a diverse range of event categories.
Social Media	Must consistently maintain a chapter Facebook, complete with chapter information.	Same as Pillar chapters
Philanthropy	N/A	Must commit to raise funds for the UGA Alumni Association Scholarship and/or the UGA Foundation, and increase alumni participation to the best of their ability.

✗ Chapter Support from the Alumni Association

	Pillar Chapters	Arch Chapters
Board	Chapter leaders receive an invitation to the annual Alumni Leadership Assembly.	Same as Pillar chapters
Events	Receive Alumni Association staff support for all events and activities. Receive supplies for chapter events from the Alumni Association office. Alumni Association sends emails to promote chapter events.	Same as Pillar chapters
Funding	Receive annual funding and can request more. May submit up to one grant request per year.	Receive annual funding and can request more. May submit up to four grant requests per year.
Social Media	Receive an official UGA Alumni Association chapter web page, which features chapter events.	Same as Pillar chapters

	Pillar Chapters	Arch Chapters
Communications	Receive a chapter logo. Receive the Monthly Chapter Leader Update email with important opportunities, resources and information. Chapter leaders have access to a Facebook network of UGA Alumni Association chapter leaders. Receive access to a listserv that allows direct communication with engaged chapter members.	In addition to the support provided to Pillar chapters: Receive an annual overview of alumni demographics in the area. Have a designated Alumni Association staff contact.
Awards	N/A	Are eligible to receive awards from the Alumni Association.
Merchandising	Ability to sell and purchase Alumni Association merchandise including T-shirts, koozies, etc.	Ability to sell and purchase merchandise featuring the chapter logo including T-shirts, koozies, etc. Have the opportunity to have a design created for the chapter (previously chapter logos).

✗ The Chapter Charter Process

Every chapter is required to submit a Chapter Charter Application annually in order to start a chapter or maintain chapter status, as well as a Mid-Year Update to confirm progress. Arch chapters must also confirm their chapter charter status on a phone call with an Alumni Association staff member. All Arch chapter leaders must sign a Memorandum of Understanding, and the presidents of Pillar chapters must also sign the form. All forms will be re-opened annually in a Chapter Leader Update Email.

○ Chapter Charter Application

The Chapter Charter Application is required for all chapters. Arch chapters must establish chartered status on the phone with a staff member after application submission. The form includes:

- A place to self-identify the chapter as either Arch or Pillar
- A complete list of chapter leaders
- Report of events, successes and opportunities from the past year
- Plan of events and goals for the coming year
- A list of all social media pages for the chapter

○ Memorandum of Understanding

The Memorandum of Understanding outlines the expectations of a chapter leader, including agreements to:

- Carry out the UGA Alumni Association mission
- Fulfill the expectations of a Pillar chapter/Arch chapter to the best of your ability
- Preserve the brand of the UGA Alumni Association
- Use listserv communication and alumni data appropriately
- Maintain the activity of the chapter's Facebook page
- Assist in the transition of the next chapter leadership
- Complete the Mid-Year Update*
- Commitment to raise funds for the Alumni Association Scholarship and/or the UGA Foundation*

*only applies to Arch chapters

○ Mid-Year Update

Arch chapters are asked to complete a Mid-Year Update to their original charter application. This form, distributed via email, asks for updated information, including:

- Updated list of chapter leaders
- Summary of events held
- Summary of plans for future events

Arch Chapter Conversation

Presidents of chapters applying to be Arch chapters must have a conversation over the phone or in-person with an Alumni Association staff member to discuss the following:

- If the chapter is ready to meet the expectations of Arch chapters
- If the president is ready to meet the expectations of a chapter president

Timeline for the Chapter Charter Process:

- January 15: Chapter Charter Applications due
- January 15 – February 15: Alumni Association staff reviews applications and call Arch chapter applicants
- Mid-February: Alumni Leadership Assembly, Memorandum of Understanding due
- August 15: Mid-Year Updates due for Arch chapters

These dates will remain the same every year.

CHAPTER BOARD
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Chapters rely on great volunteers. A successful chapter needs a base of chapter leaders it can rely on to stay active and engaging. Active volunteers in the chapter leadership keep the group current and energized, and allow for the work to be divided among the chapter board. Volunteers are the lifeblood of the Alumni Association – it wouldn't be possible without you!

✘ Job Descriptions

Below are job descriptions for alumni chapter leaders. Pillar and Arch chapters are required to have a president, and Arch chapters are required to have a vice president. Chapter leaders may absorb the responsibilities of other positions if serving on a smaller board.

President

1. **Provide overall leadership and direction** to the alumni chapter;

2. **Establish chapter goals** in support of the mission of the Alumni Association;

3. **Attend chapter events** and activities;

4. **Preside over chapter leadership** meetings;

5. **Honor the Memorandum** of Understanding;

6. **Exercise overall financial responsibility** for the chapter;

7. **Ensure all event revenues** and invoices are submitted in compliance with UGA and Alumni Association policy;

8. **Attend, or designate another chapter leader to attend,** the annual Alumni Leadership Assembly and report back to the chapter;

9. **Maintain contact** with Alumni Association staff;

10. **Submit a Chapter Charter Application** and Mid-Year Update to the Alumni Association by their designated deadlines;

11. **Ensure the position** has a successor.

Vice President

1. **Preside over meetings** in the absence of the president;

2. **Coordinate programs** and events with president and chapter leaders;

3. **Serve as liaison** to other alumni groups to plan collaborative events (e.g. other schools' alumni groups);

4. **Coordinate with the chapter president** to advise all chapter leaders in the completion of tasks and responsibilities

5. **Serve as interim president,** if necessary, during a presidential transition.

Director of Events

1. **Plan and coordinate events** with president and other chapter leaders;

2. **Work with vendors** and venues for event details;

3. **Handle event** logistics;

4. **Work with director of communications** and other chapter leaders to advertise and market events;

5. **Develop event budgets** and submit grant requests if necessary.

Director of Game Watching Parties

1. **Coordinate UGA football** Game Watching Parties for the chapter;

2. **Pick a location** for the Game Watching Parties;

3. **Coordinate with chapter leadership** about which games will have Game Watching Parties;

4. **Work with director of communications** and other chapter leaders to handle marketing and advertising of Game Watching Parties;

5. **Submit to the Alumni Association** the required information for Game Watching Parties by the deadline.

Director of Communications

1. **Coordinate chapter communications** with chapter leaders

2. **Maintain board meeting** minutes and distribute to chapter leaders;

3. **Utilize social media** to promote the chapter and chapter events, share images and engage alumni online;

4. **Connect with new attendees** at events to add them to chapter listserv;

5. **Recommend to new alumni** to update their contact information with the UGA Alumni Association;

6. **Support chapter president** and vice president with listserv communication;

7. **Coordinate** event communication with other chapter leaders.

Liaison to an Area

(ex. Liaison to the Orange County Area, Southern California Chapter):

1. **Represent a unique region** within a chapter area;

2. **Serve as the point of contact** for events in that area.

Affinity Representative

(ex. Young Alumni Representative, Women of UGA Representative, Black Alumni Representative)

1. **Represent a group** of alumni and friends linked by a common interest, purpose, or identity;

2. **Plan events** targeted for a specific affinity groups with other chapter leaders.

✗ How to Transition Leadership

When it is time to transition leadership, there are a series of steps that should be taken. Following these procedures will ensure that chapter engagement remains consistent and chapter members have the best experience possible.

◌ Chapter President:

When there is an outgoing president, the following steps should be taken:

1. Alert the chapter board and begin to seek a replacement

    a. The outgoing chapter president should construct a chapter update to alert the chapter board that he/she will step down and to ask for those interested in the position to send an email to him/her. The chapter president and chapter leadership should collectively review applicants and select a new candidate.

    b. If the outgoing chapter president is unable to find a replacement, he/she should train the vice president to serve as interim, and the chapter board should continue seeking a replacement.

        i. In this case, it is helpful to host a Chapter Leader Interest Meeting for local alumni. The Alumni Association will send an email to everyone in the chapter area encouraging them to attend to learn more about becoming a chapter leader. Please reach out to Alumni Association staff to help with this process.

2. Once a new chapter president is selected, post a chapter president profile on social media pages, plan a board meeting and alert the Alumni Association of the change by completing a Chapter Leader Transition Form online.

3. If possible, the outgoing and incoming president should meet to discuss chapter business, upcoming events and long-term plans.

○ **Other Chapter Leaders:**

At all chapter events, be sure to note highly engaged and involved alumni. If a chapter leader must step down, try reaching out to these alumni individually to seek a replacement. A Chapter Leader Interest Meeting is helpful in recruiting a new chapter board as well. If these steps do not garner interest, announcing opening positions via social media and email can create interest in the position from your chapter membership. Remember to alert the Alumni Association to any changes by completing a Chapter Leader Transition Form online.

EVENTS

Chapters are encouraged to plan diverse events that engage alumni with varied interests. Some alumni are interested in a sporting event, while others are more interested in networking. Providing a wide range of activities for alumni in your area gets more people involved with the chapter. Creativity in programming keeps alumni involvement fun and exciting for attendees.

Arch chapters must host at least six events per year in at least four of the following seven event categories. Pillar chapters have no annual requirements with regards to events. Annual and nationwide events will be available for all chapters to participate in and will count toward required events for Arch chapters.

Event Categories and Ideas

Alumni Connect

An event that allows alumni to connect and engage with one another in a social setting. Examples include:

- **Alumni Mixer:** An event to connect alumni. These usually have appetizers, beverages and plenty of room to mingle.

- **Ticketed Sporting Events:** An organized outing to a baseball, basketball, football, gymnastics, volleyball, etc. game. Support UGA teams by checking their schedules for games in your area! For these events, please review the ticketed event policies.

- **Game Watching Parties:** Take place during UGA football games. These usually occur at a local restaurant or sports bar that will play the game. It may be popular to have UGA basketball game watching parties in your area as well.

- **Intramural Leagues:** A great way to connect a smaller number of alumni for a long period of time. Joining a local kickball, softball, etc. league gives chapter members the opportunity to meet regularly to compete.

- **Bowling Night, Wine Tasting, Mini-Golf Outing:** Give alumni the opportunity to connect while doing something fun in your city.

- **SEC Tailgate:** A great opportunity to meet fellow SEC fans in the area by hosting collaborative events with alumni chapters from other institutions.

○ Academic Interest

An event that fulfills UGA's mission to create lifelong learners. Examples include:

- **Educational Speaker:** Have a UGA faculty speaker or local expert come to your chapter to speak and educate chapter members. Great events often incorporate the speaker message into a hands-on learning experience!

- **Tour a Museum or Historical Site:** Chapter members enjoy events that highlight the local area. Consider museums, landmarks and historical venues for tours and information sessions.

- **Book Club:** Select a book for chapter members to read, advertise the event far in advance and gather to discuss, debate and review the piece.

Professional Development and Networking

An event that seeks to connect alumni on the basis of professional growth and development. Examples include:

- **Bulldogs After Business Hours:** The most common chapter networking event. This is similar to an Alumni Mixer, but it takes place after work hours and encourages attendees to bring business cards and network with one another.

- **Bulldog Breakfast Club:** Meet Before the workday begins to network with local alumni over a cup of coffee and breakfast.

- **Virtual Networking Hours:** Network with fellow alumni through UGA's Virtual Networking Hours. These events are coordinated by Alumni Association staff, so please contact staff for further information on upcoming events.

Student-Focused

An event during which local alumni support or connect with UGA students. Examples include:

- **Give That Dawg a Bone:** Participate in the UGA Admissions card-writing campaign, from January through March. Share encouraging messages and fond UGA memories with newly accepted UGA students.

- **Freshman Send-Offs:** At the end of summer and before first-year students at UGA move to Athens, your chapter could help to host a Freshman Send-Off event to wish them well.

  Additional information can be found on page 26.

- **Participate in a Local College Fair:** Have chapter members learn how to officially market UGA to prospective students. This will mean they are able to volunteer at local college fairs on behalf of UGA. Please reach out to the Alumni Association staff for details.

  Additional information can be found in the Chapter Leader Resources online.

- **Host IMPACT Students:** Each winter and spring break, UGA students travel the country to provide service to others. If IMPACT students are heading your way, Alumni Association staff will notify you. Consider hosting a dinner, picnic, or helping them volunteer.

○ Service

An event that invites alumni and friends to serve and engage with the community. Examples include:

- **Volunteer with a Local Service Organization:** River cleanups, serving in soup kitchens and volunteering at a clothing bank are all great ways to engage alumni in their community and the UGA community.

- **Host a Drive:** Coat, canned goods, or school supply drives are easy components to add to any chapter event or board meeting. They add a service component to any event and keep alumni active in the community. Donations for these events must be supplied by chapter members and cannot be purchased with annual or grant funding.

○ **Donorship**

An event that has a fundraising component for the Alumni Association Scholarship and/or the Georgia Fund. Examples include:

- **Option to Donate at Registration:** Add a donation option to event registrations to promote giving in conjunction with event attendance. This is done through the Event Request Form.

- **Partial Donation with Registration Fees:** Charge registration for an event, and have part be a donation to the university and part cover event fees. Event invitation will inform chapter members that they are making a partial donation.

- **Donation as Part of Merchandise Sales:** Add a donation to the production cost of T-shirt or merchandise sales.

⌕ Affinity (Common Interest)

An event that caters to any group of people linked by a common interest, purpose, or identity. Our official Alumni Association Affinity Groups include: Women of UGA, UGA Black Alumni, and Young Alumni programming. Examples of affinity groups include:

- **Identity-based** (UGA Black Alumni, Women of UGA, Young Alumni, etc.)
- **Student Activity Involvement** (Student Alumni Council, Arch Society, Student Government Association, athletics, fraternities and sororities, etc.)

For professional and special interest affinity events, evites will be sent to all constituents in the chapter area. Evites can be segmented to specifically reach out to identity-based affinity groups and those involved in student activities.

✗ Annual and Nationwide Events

Annual and nationwide events will be available for all chapters to participate in and will count toward required events for Arch chapters. All chapters can participate in these events by completing a form sent to chapter leaders in the monthly Chapter Leader Update email.

⌕ Annual Events

Annual events take place each year. These events may not occur in all chapter areas, but chapters that plan them may select a date, venue, etc. that works for them. Examples include:

1. **Game Watching Parties:** Coinciding with many or all of the UGA football games, chapter gathers to watch the game, connect and cheer.

2. **Freshman Send-Offs:** Just before school begins, chapters help to host first-year UGA students in a celebration of the beginnings of their time in the UGA community. These events must be staffed by UGA staff, and may be contingent upon the number of incoming first-year students from the area.

If staff is unable to attend the Freshman Sendoff or there are a small number of incoming first-year students from the area, chapters may host a Student Focused event welcoming the new class into the Bulldog Nation. Please contact Alumni Association staff for assistance with these events.

○ Nationwide Events

These events will take place on the same day for all chapters, and they will be promoted in a nationwide email that directs to a landing page where alumni and friends can see where the event will take place in their area. Examples include:

1. **"Welcome to the City!":** Following commencement, a nationwide Bulldogs After Business Hours event to welcome young alumni and those who have recently moved to the alumni network in their city.

2. **Dawg Day of Service:** Each chapter chooses a service opportunity in their area.

✗ Event Request Form

Chapters must submit an Event Request Form for all events. The form must be submitted at least two weeks prior to the event. Events with a vendor, speaker, or ticketing component must be submitted six weeks prior to the event. Events that go through the Grant Program do not require the submission of an additional Event Request Form. Event Request Forms are found on the Alumni Association Web Page.

Once submitted, events will be:

- **Advertised to your chapter** via official UGA evites, if requested
- **Included on the Alumni** Association online events calendar
- **Added to the chapter** Web Page

○ Event Request Forms ask for all relevant event details, including:

- Date, time, location, description and category of event
- Registration details
- The opportunity to request event supplies
- Contact information for the event planner

✗ Event Planning Guide and Timeline

⚪ **3-4 months before the event:** Meet with the chapter board to brainstorm event ideas. Consider how events will connect alumni to one another and to UGA. Determine if the event is going to require grant funding. If so, submit a grant application by the grant deadline.

⚪ **1-2 months before the event:** Contact venues and vendors. Give your chapter time to draft contracts and send them to the Alumni Association to be signed. Make a save-the-date post on chapter social media pages for chapter members.

⚪ **3-6 weeks before the event:** Submit the Event Request Form. Begin to advertise the event through your chapter listserv, social media and by word of mouth.

⚪ **At the event:** Chapter board members should serve as hosts at events. Encourage new attendees to update their contact information on the Alumni Association website and sign up for your chapter's listserv. Take photos for social media posts.

⚪ **After the event:** Send a follow-up email to attendees who have been newly added to the listserv, thanking them for wanting to get involved. Add interested attendees to the listserv, or send the list of these emails and names to Alumni Association staff to have them added. Thank chapter board members who helped with the event. Share photos from the event on social media and send to Alumni Association staff.

✗ Ticketed Events Policy

Chapters have the opportunity to coordinate events that involve tickets (athletic events, shows, performances, etc.). Ticketed events often take longer than other events to coordinate, so chapter leadership should consider this when planning the occasion.

If advanced tickets are purchased, consider the following:

- If it is possible for chapter members to order tickets individually via a venue-owned website, this option must be utilized.

- Event Request Forms for ticketed events must be submitted six weeks prior to the event. **Do not submit grant funding requests for ticketed events.**

- Chapter leaders must ask the venue to complete a W-9, to be submitted in the Event Request Form.

- If the venue does not allow group ticket orders on their own website but requires pre-ordered bulk tickets, chapter leaders should work with the Alumni Association office to determine quantity and price of tickets.

- If bulk tickets must be purchased in advance of the event, chapter leaders must use the Alumni Association to pay for the tickets.

To find the W-9 Form, please visit the Alumni Chapter Leader Resources page online.

✗ Liability Information

○ Contracts

Send all contracts to the Alumni Association to be signed. This process prevents chapter leaders from becoming personally liable for the contract.

Door Prizes

Chapters can choose to give away free door prizes at free chapter events. If the chapter would like to request prizes, they can do so through the Event Request Form. Chapters are not allowed to hold raffles or other "games of risk/chance" at the event. The Alumni Association will act as a liaison between other schools, colleges, departments and units for prizes when necessary.

Alcohol Policy

All chapter events must follow the official UGA alcohol policy. To review the complete alcohol policy, please visit the Chapter Leader Resources web page.

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.

Money

- Chapters are not permitted to hold private banking accounts.

- Chapter leaders may accept cash on behalf of the UGA Alumni Association, but they must complete the following:

  - Provide cash receipts on site (can be sent with event supplies)

  - Maintain dual control. One person handles cash, and the other writes and handles receipts

  - At the end of the event, both people involved in cash handling must verify that the cash total matches the receipts and each sign off on the total

  - Cash collected must be converted to a cashier's check payable to the UGA Alumni Association

  - Mail the cashier's check and receipt carbon copies to the Wray Nicholson house to the attention of your Alumni Association staff contact
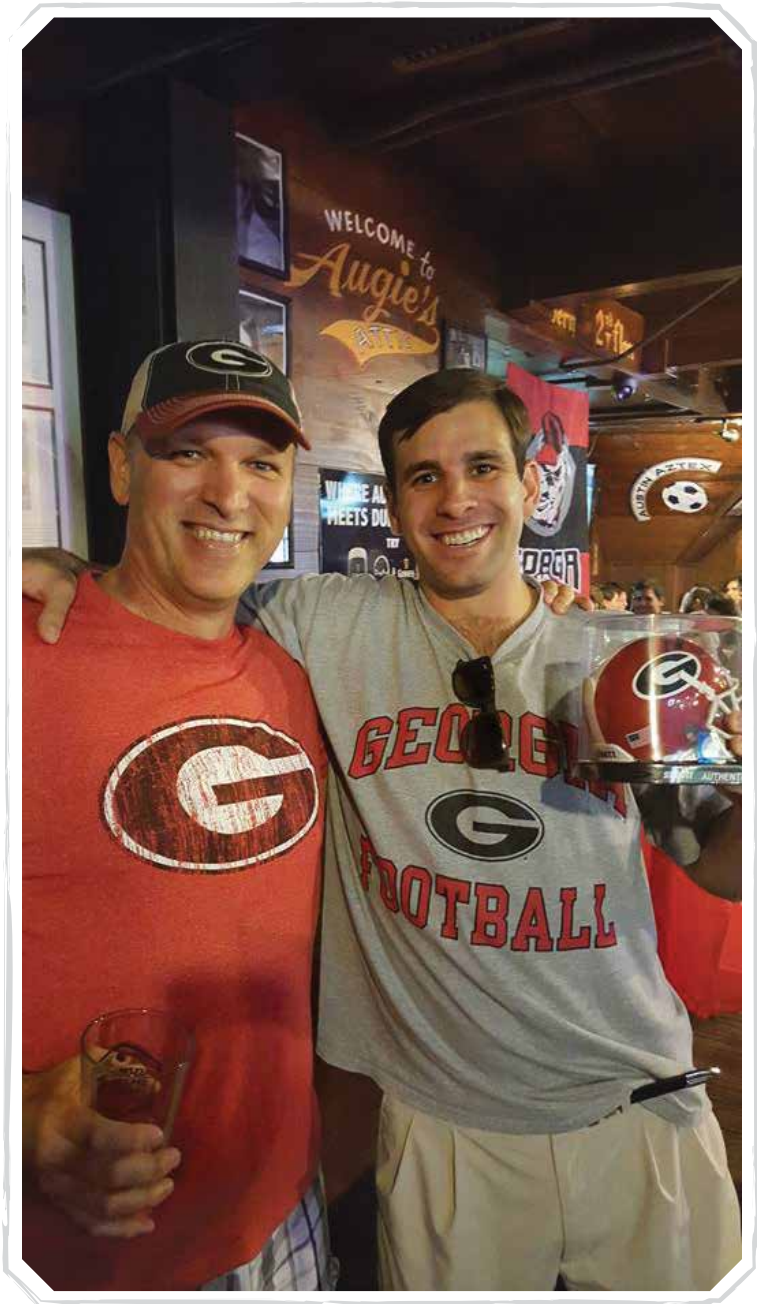
GIFT RECOGNITION AND SPONSORSHIPS
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Chapters can have local businesses, companies and/or individuals help offset costs for a chapter event. Local companies may want to provide door prizes, event supplies or a monetary gift. In return for providing gifts or services, they can receive gift recognition from the UGA Foundation. Sponsorships are great ways to further fund chapter events and support the university! Chapter event sponsors can be recognized on event marketing materials, as part of the event program, and on social media pages. Please contact Alumni Association staff for more information about sponsorships.

✗ Types of Gifts:

- **Monetary Gifts:** Individuals or businesses that would like to sponsor a chapter event are encouraged to make a monetary gift directly to the university. A check can be mailed directly to the Alumni Association, and Alumni Association staff will ensure the funds are used towards the chapter event. This kind of gift also ensures that the sponsorship will be considered a tax-deductible gift. We strongly recommend sponsoring chapter events through this form of gift when possible.

- **Gifts of Service:** Individuals or vendors may wish to make a contribution of services such as catering, music, floral arrangements, etc. They can be recognized with a gift receipt or letter of acknowledgement for covering the costs of a chapter event.

Other forms of gifts may be possible on a case by case basis to sponsor a chapter event. Sponsorships must be consistent with the mission of the university and processed by Alumni Association staff.

FINANCES
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✗ Annual Chapter Funding

All chapters receive annual chapter funding at the beginning of the fiscal year (July 1), so there is no need to fundraise to support chapter activities. The amount of annual chapter funding allocated to a chapter is provided on a graduated scale, corresponding with the federally established per diem Meals & Incidental Expenses (M&IE) tier for the area. Allocations are as follows:

M&IE Tier	Annual Funding
1	$200
2	$250
3	$300
4	$350
5	$400
6	$450

Alumni Association staff confirms the chapter's annual chapter funding allocation after the Chapter Charter Application is completed, but the M&IE Tiers can always be found on the General Services Administration website: **www.gsa.gov**.

Chapters will be able to seek additional funding in two ways: supplemental annual chapter funding and grant funding. Supplemental annual chapter funding is designed to extend the reach of original chapter funding. Grant funding is designed to supply the financial support for larger events.

At the start of each fiscal year, the chapter account will be balanced to the original designated annual chapter funding amount. If a chapter spends all of its annual chapter funding before the end of the fiscal year, the chapter may request more. Contact Alumni Association staff to inquire about annual chapter fund balances at any time. Approved uses of annual chapter funding include:

- **Event Supplies**
    - Light hors d'oevres for chapter events (*this does not include providing food at board meetings*)
    - Gift for a visiting speaker
    - Cups, plates, cutlery and tablecloths
    - Venue reservations
    - Chapter supplies not otherwise available through the Alumni Association office
- **Reusable Chapter Materials**
    - Chapter banner
    - Sign for chapter events
- **Chapter Merchandise** (Arch chapters only, see *Guidelines for Trademarks, Logos and Merchandise*)
    - Business cards
    - Bumper stickers
    - Koozies to distribute at chapter events

Beginning February 21, 2016, chapters will have until July 1, 2018, to spend money currently in their chapter accounts. After July 1, 2018, an alumni staff member will contact the chapter leaders to discuss options on what to do with the remaining money. Chapters will be encouraged to move that money to the Alumni Association Endowed Scholarship Fund. No annual chapter funding or grant funding will be provided to chapters until they have exhausted the existing funds in their chapter accounts.

✗ Supplemental Annual Chapter Funding

Chapters can apply for more annual funding through the Supplemental Annual Chapter Funding Application online. Supplemental annual chapter funding will be granted to chapters that have exhausted their annual funds and provide justification for why additional funds are needed. Supplemental Annual Chapter Funding Applications are accepted throughout the year and will be approved, modified, or denied by Alumni Association staff within two weeks. Additional money for a single, large event can be requested through the Grant Funding Application.

✗ Grant Funding

Grant funding is available to chapters when the cost of an event will exceed the chapter's remaining annual chapter funding. Requests for grant funding for an event must be submitted by a quarterly deadline. Arch chapters may submit up to four grant requests per year; Pillar chapters may submit one.

○ How to Use the Grant Program

Grant funding applications are successful if the event is effective through one or more of the following:

- **Strengthens and/or expands alumni outreach** to the broadest group of alumni or to a strategically targeted segment of the alumni constituency

- **Strengthens and/or expands the interaction** between alumni and students to increase the Alumni Association's visibility among alumni and students

- **Strengthens and/or expands the number** of meaningful opportunities for collaborations and partnerships

- **Creates a greater awareness** of the Alumni Association and your chapter area and constituent group

Grant funding applications will be reviewed by Alumni Association staff and submitted to the Alumni Association Board's chapters committee for approval. Future grant funding for events will be contingent upon the accurate documentation and timely submission of all invoices and receipts after the event.

Grant funding requests must include an estimate for total requested funding, not to be exceeded without further Alumni Association approval. Grant funds are not added to the annual chapter funding total if not used to completion.

To find the Grant Request Form, please see the Chapter Leader Resources online. If a grant funding application for an event is submitted by a chapter, no Event Request Form is required.

○ **Grant Schedule**

- Grant applications for events February 15– May 14 must be submitted by **January 1.**

- Grant applications for events May 15–August 14 must be submitted by **April 1.**

- Grant applications for events August 15–November 14 must be submitted by **July 1.**

- Grant applications for events November 15– February 14 must be submitted by **October 1.**

To view a calendar of these dates, please see the Chapter Leader Resources online.

✗ Reimbursement Procedures

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 W-9 (which requires your social security number): **www.irs.gov/pub/irs-pdf/fw9.pdf.**

An individual must also fill out an honorarium: **www.busfin.uga.edu/forms/non_emp_payment.pdf.**

You will also be required to provide a copy of your paid receipt showing a zero balance. If an event involves reimbursement for food or drinks, you must provide a list of attendees.

If you have an event and a vendor needs to be reimbursed, any payment from UGA or the UGA Foundation requires that a vendor be set up in the system for payment. Additionally, the IRS requires that a W-9 be on file for every vendor in case a 1099 is required to be sent to a vendor.

COMMUNICATIONS

Chapter Web Pages

All chapters are designated a web page through the Alumni Association. This web page features chapter leader contact information and headshots, chapter information, recent and upcoming events, links to social media pages and more. To have information updated, contact Alumni Association staff.

Evites

Whether or not the chapter requests an evite, the Event Request Form must be submitted for all events. Chapter leaders can have an evite created for all chapter events. Evites are sent to all UGA constituents (alumni, family and friends) within the chapter area. If the chapter elects not to use an evite, the event is still listed on the chapter web page but must be promoted exclusively by the chapter through social media and listserv communication. Nationwide and Annual event invitations are sent to all alumni, so they have specialized event request forms.

Chapter leaders are able to recommend days for the email blast within the Event Request Form. Alumni Association staff will provide a draft of the evite within three business days of the submission for the chapter leader to approve. The form must be submitted at least two weeks prior to the event. Events with a vendor, speaker, or ticketing component must be submitted six weeks prior to the event.

✗ Chapter Listservs

A listserv is an email tool that allows chapter leaders to send an email to many people. All chapters will have access to a UGA listserv that can be used to communicate directly with engaged constituents in their areas who opt-in to receive listserv communications. Use of the listserv is at the discretion of chapter leaders, and only chapter leaders who have completed a Memorandum of Understanding may send email via the listserv.

How do I get access to the listserv?

To first gain access to your chapter's listserv, a chapter leader must sign a Memorandum of Understanding agreeing to use listserv communication and alumni data appropriately. Alumni Association staff will then add the chapter leader as an administrator, meaning the chapter leader will be able to send emails through the listserv and add individuals as recipients of the listserv.

How do I use the listserv?

Alumni Association staff will give the chapter leader the email address of the listserv (such as **AlumAthens@listserv.uga.edu** for the Athens Chapter). An email addressed to this email address will send a message to all individuals who have signed up to be a recipient of that list. Only Alumni Association staff and trained chapter leaders have the ability to send email via the listserv.

How do people sign up for the listserv?

Alumni and friends can opt into the listserv by providing their email addresses to a chapter leader or Alumni Association staff member. You are encouraged to have a Listserv Sign-Up Sheet (available in Chapter Leader Resources online) at each event, where individuals can choose to opt-in to the chapter listserv by providing their email addresses. Individuals cannot be involuntarily added. Step-by-step instructions on how an authorized chapter leader can add individuals to a listserv can be found on the Chapter Leader Resources web page.

Listserv Information:

- Only chapter leaders and Alumni Association staff are able to send messages through the listserv. Email recipients cannot "reply all."

- A designated Alumni Association staff member will be included as a recipient on chapter listservs to review usage.

Tips:

- Include a call-to-action in the first paragraph, i.e. "Register for our reception today."

- Try to send no more than one email per week.

- Emails that are brief are more likely to be read by recipients.

- Keep in mind you are representing the university. Best practices for listserv messages include:

  - Mention the chapter name in the subject line or at the top of the email

  - Include a greeting and a signature from whomever is sending the email

  - Use proper grammar and formatting

  - Use appropriate language

  - Be positive!

✗ Social Media

All chapters must consistently maintain an active Facebook page or group that is active monthly at a minimum. Chapters are permitted to have any/all social media they would like, including Instagram, LinkedIn, Twitter, etc. If you would like to see tips for using social media, please visit the Chapter Leader Resources online.

✗ Chapter Logos and Designs

All chapters will receive a logo that can be used on social media, chapter emails, chapter web pages, etc. Arch chapters have the opportunity to use these logos on merchandise, such as T-shirts and koozies. Arch chapters may also use other chapter designs on merchandise, which they can create themselves or work with the Alumni Association to have created. All chapter designs must follow the guidelines for trademarks, logos and merchandise.

✗ Guidelines for Trademarks, Logos and Merchandise

The university's trademark policy applies to all designed artwork for chapter merchandise. No alterations of the university marks or logos are allowed. Prior to production, artwork must be sent to the Alumni Association for legal approval.

Only Arch chapters are eligible to have chapter merchandise created. The Alumni Association will assist in production of business cards and chapter artwork designs. All merchandise production is required to be done through a Collegiate Licensing Company (CLC) licensed vendor.

If the chapter does not have explicit permission from the Alumni Association, they are not authorized to use a mark, logo or verbiage even if a printer is willing to print the job without it. It is the chapter's responsibility to acquire the approval before going to print. *Chapters cannot print merchandise until official approval is granted.* The Alumni Association team will work directly with vendors to print all merchandise.

Please visit the Chapter Leaders Resources page for the full policy on trademarks and logos.

T-Shirt Policy

Chapters may print T-shirts for individual purchase by chapter members. All merchandising policies must be followed, so chapters should alert the Alumni Association if they would like to proceed with this option.

All T-shirt order Web Pages must include the option for chapter members to order a T-shirt with or without a donation.

Alumni Association staff manage the T-shirt and merchandising process. Please keep in mind that this process has several steps and may take 1-2 months. The T-shirt process includes the following steps:

- Create a mockup of a chapter T-shirt
  - Chapter logos may be used for T-shirts. If the chapter does not already have a design and would like to use a design for T-shirts, a design will need to be created
- Get approval from the university and the Athletic Association if any protected logos or designs are used
- Set up a Web Page and order form, then begin selling
- Sell for a minimum of three weeks.
  - An email will be sent to all constituents in the chapter area. Chapter leaders should continuously use social media and their listserv to promote sales
- Order closes, shirts are printed and shipped

○ **Business Cards**

Chapters may use business cards to advertise social media pages, engage new members and promote the chapter to local alumni. All business cards should include information about social media platforms, and they may not include chapter leader names.

The business card process includes the following steps:

- If the chapter does not already have a design, create a design
- Create a template for the business card
- Approve, have Alumni Association print and ship

○ **Other Merchandise**

If you are interested in other merchandise for your chapter (Koozies, signage, etc.), contact Alumni Association staff for assistance.

POINTS SYSTEM AND CHAPTER AWARDS
✘ ✘ ✘

✘ Points System

Throughout the year, Arch chapters can earn points to qualify for the Chapter of Excellence and Chapter of the Year awards.

Points are earned as follows:

100% giving participation by chapter leaders	5 points
Completing the Chapter Charter Application	3 points
Completing the Mid-Year Update	2 points
First chapter event in each category	3 points
Additional chapter events in each category	1 points

For example: The first time a chapter hosts a networking event, the chapter will receive 3 points. For each additional networking event hosted during the year, the chapter will earn 1 point per event.

Example: An Arch chapter fulfills all chapter requirements

100% chapter leader giving	5 points
Completed Chapter Charter Application	3 points
Completed Mid-Year Update	2 points
Host six events in four unique categories:	
Four events in four different categories	12 points
Two events in repeated categories	2 points
Total	**24 points**

✗ Chapter Awards

Arch chapters can be recognized for their accomplishments and efforts to support the UGA community each year. Chapters may nominate their own chapter and chapter leaders for any or all awards. The Chapter of Excellence award does not require a nomination. Nomination forms and deadlines are emailed to chapter leaders each year.

○ Chapter of Excellence

Recognizes chapters that have excelled within the expectations laid out by the Alumni Association. To earn this award, a chapter must:

- Earn a minimum of 20 points during the year
- Maintain an active Facebook page with at least one post per month

Chapter of the Year

Recognizes chapters that have gone above and beyond in their service to UGA and alumni. To be considered for this award, a chapter must:

- Earn a minimum of 25 points during the year
- Have 100% giving participation by the chapter board
- Have had at least one chapter representative attend the previous year's Alumni Leadership Assembly
- Submit a nomination form describing how the chapter has supported UGA's mission

Volunteer of the Year

Recognizes individuals who have gone above and beyond in their service to UGA and alumni. To be considered for this award, a nomination form must be submitted which outlines:

- Why the individual should be considered for Volunteer of the Year
- How his/her leadership impacts the chapter area
- How he/she supports and connects alumni

Event of the Year

Recognizes events that excel in one or more of the seven event categories. To be considered for this award, a nomination form must be submitted which outlines:

- Why the event should be considered
- How the chapter advertised the event
- Estimated attendance
- How the event supports alumni, the chapter and UGA

Philanthropic Chapter of the Year

Recognizes chapters that have excelled in promoting donations to the UGA Alumni Association Scholarship or Georgia Fund. To be

considered for this award, a nomination form must be submitted which outlines:

- How the chapter has promoted donations
- Chapter events with a giving component
- Marketing efforts to promote donations

○ Emerging Chapter of the Year

Recognizes chapters that have made significant steps in the development of their chapter. To be considered for this award, a nomination form must be submitted which outlines:

- New and traditional programming efforts
- Development of new initiatives
- Other accomplishments and successes

ADDITIONAL INFORMATION

✗ FERPA

The Family Educational Rights and Privacy Act (FERPA) is a federal privacy law that restricts the disclosure of student records, such as report cards, transcripts, disciplinary records, contact and family information, and class schedules.

○ How does this apply to chapters?

Once a student accepts his/her admission into UGA, the Office of Admissions can no longer release his/her contact information. Contact information is available for the Give That Dawg A Bone letter writing campaign (before admission is accepted) as Alumni card writers are acting as volunteer agents in support of the Office of Admissions. Once an admitted student has deposited, they officially become a "student" of UGA, and their contact information is not available to volunteers for Freshman Send-Offs after admission is accepted.