

UGA ALUMNI ASSOCIATION

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alumni.uga.edu

UNIVERSITY OF GEORGIA

ALUMNI CHAPTER PLAYBOOK

ALUMNI ASSOCIATION



UNIVERSITY OF
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Alumni Association



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LETTER FROM THE EXECUTIVE DIRECTOR



Hilton Head Dawgs enjoy a visit from the UGA Women's Golf Team



Alumni have always been a vital part of the University of Georgia's success, and chapter leaders like you are the lifeblood of our organization. Since the founding of the Alumni Society in 1834, dedicated graduates have helped what is now the UGA Alumni Association carry on a tradition of engagement, service and philanthropy for Bulldogs around the world.

The UGA Division of Development and Alumni Relations, which houses the Alumni Association, the Career Center and our fundraising teams, counts on you as we pursue our vision of 'Every Bulldog Committed to Georgia.' Your efforts to bring UGA to the more than 318,000 alumni around the world provide them, their families and other university supporters with opportunities for remaining active with the birthplace of higher education in America. For your labor of love, we are exceedingly thankful.

We are pleased to provide you with this Playbook to guide your efforts to cultivate connections, hiring, and giving among alumni. It is meant to be shared with your fellow alumni volunteers and as a resource for you throughout the year, and Alumni Association staff are always happy to answer any questions you have or provide additional guidance and support.

We thank you for your commitment to the University of Georgia. Because of you, Bulldogs never bark alone.

We look forward to working with you,

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

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ABOUT THE ALUMNI ASSOCIATION

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 states and nations intellectual, cultural and environmental heritage.

✕ 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.

ALUMNI CHAPTERS

UGA ALUMNI ASSOCIATION

✕ 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.

✕ UGA ALUMNI CHAPTERS MISSION STATEMENT

The Alumni Chapters program seeks to advance the mission of the UGA Alumni Association by training committed volunteers and inspiring alumni and friends to connect to the university through meaningful experiences that are engaging and lead to deeper connections within their specific communities.



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.

ARCH CHAPTERS & PILLAR CHAPTERS

There are two types of alumni chapters: Pillar chapters and Arch chapters. Alumni can serve as a chapter leader for Arch or Pillar chapters, or as a Point of Contact for their region. All chapters will begin as Pillar chapters.

✕ PILLAR CHAPTERS

- Have a chapter president
- Submit a Chapter Charter Application every year
- Chapter President must sign Memorandum of Understanding outlining the expectations of a chapter leader
- Host events and/or game watching parties
- Consistently maintain a chapter Facebook page with updated chapter information



✕ ARCH CHAPTERS

- Have a chapter president and vice president
- Submit a Chapter Charter Application every year
- All chapter leaders must sign Memorandum of Understanding outlining the expectations of a chapter leader
- Have at least one chapter leader attend the annual Alumni Leadership Assembly
- Host a minimum of six events from at least four categories every year
- Consistently maintain a chapter Facebook page with updated chapter information
- Commit to raise funds for the UGA Foundation and increase alumni participation to the best of the chapter's ability

✕ ALUMNI POINT OF CONTACT

If you'd like to support UGA and alumni engagement in your community, you can be an Alumni Point of Contact. This is often a good fit for regions with fewer than 500 alumni and friends. These are the expectations for Alumni Points of Contact:

- Submit a Point of Contact Application once a year
- Sign a Memorandum of Understanding
- Respond to inquiries from local alumni

If you are interested in becoming an Alumni Point of Contact, please contact Alumni Association staff at alumnichapters@uga.edu.



CHAPTER CHARTER PROCESS

Every chapter is required to submit a Chapter Charter Application annually in order to start a chapter or maintain chapter status. All Arch chapter leaders and Pillar chapter presidents must sign a Memorandum of Understanding. Chapter Charter applications need to be re-submitted annually and will be sent to chapter leaders through a Chapter Leader Update. Any chapter that does not submit a Chapter Charter Application by January 31 will no longer be considered a chapter and will have their webpage removed.

✕ CHAPTER CHARTER APPLICATION

The Chapter Charter Application is required for all chapters. Arch chapters in their first year must establish chartered status on the phone with a staff member after an application has been submitted. 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
- Commitment to raise funds for the Alumni Association Scholarship and/or UGA Foundation

✕ ARCH CHAPTER CONVERSATION

Presidents of chapters applying to become an Arch chapter from a Pillar chapter 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 an Arch chapter
- If the president is ready to meet the expectations of a chapter president

✕ TIMELINE FOR THE CHAPTER CHARTER PROCESS:

- January 31: Chapter Charter applications due
- January 31 through mid-February: Alumni Association reviews applications and confirms each chapter's status

CHAPTER BOARD

Chapters rely on great volunteers. A successful chapter needs a base of chapter leaders it can rely on to stay active and engaged. Volunteers are the lifeblood of the Alumni Association – it wouldn't be possible without you!

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 board 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 to the Alumni Association by the designated deadline;
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 other 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 chapter leaders in the completing 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 athletics 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 required Game Watching Party information to the Alumni Association by given 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 that they 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

1. Represent a unique region within a chapter area (ex. Liaison to the Orange County Area, Southern California Chapter);
2. Serve as the point of contact for events in that area.

▶ AFFINITY REPRESENTATIVE

1. Represent a group of alumni and friends who are linked by a common interest, purpose, or identity (ex. Young Alumni Representative, Women of UGA Representative, Black Alumni Representative);
2. Plan events targeted for a specific affinity groups with other chapter leaders.

More information about affinity groups and how to get involved can be found online at www.alumni.uga.edu/networks.



TRANSITIONING 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 that chapter members have the best experience possible. Remember that your Alumni Association staff contact should always be alerted to leadership transitions so all necessary steps are taken.

✕ CHAPTER PRESIDENT

When there is an outgoing president, the following steps should be taken. If any of the following steps are unsuccessful, please speak with your Alumni Association staff contact for additional guidance.

1. Alert the chapter board and your Alumni Association staff contact, then begin seeking a replacement.
 - a. The outgoing chapter president should construct a chapter update to alert the chapter board that they will be stepping down and to ask for those interested in the position to send them an email. 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, they 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 contacting your designated Alumni staff contact.
3. If possible, the outgoing and incoming president should meet to discuss chapter business, upcoming events, and long-term plans. If this is not possible, alert your Alumni Association staff contact to help ensure a smooth transition is possible.



✕ 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 also helpful in recruiting a new chapter board. If these steps do not garner interest, announcing open positions via social media or through email can help recruit volunteers. Remember to alert the Alumni Association to any changes by emailing your staff contact.

✕ TIPS FOR EFFECTIVE CHAPTER MANAGEMENT

- Chapter Bylaws can be a great way to set expectations and lay the framework for leadership term limits and transitions. Talk to your Alumni Association staff contact to figure out if having bylaws would be a good fit for your chapter.
- There is no right or wrong answer for how many people should be on a chapter board. The size of the chapter board depends on many factors, including size of the geographic area, number of people who want to be involved, and the number of events the chapter hosts each year. Be specific in setting expectations for Chapter Leaders.



Colorado Dawgs enjoying the annual Dawg Sledding chapter event



SUPPORT FROM THE ALUMNI ASSOCIATION

✕ ALL CHAPTERS RECEIVE:

- An invitation to the annual Alumni Leadership Assembly and designated staff contact for coaching with all activities and events
- Supplies for chapter events from the Alumni Association office upon request
- Alumni Association invites to promote chapter events upon request
- Annual chapter funding money and the ability to apply for grant funding
- Official UGA Alumni Association chapter web page featuring chapter leaders, photos, and upcoming chapter events
- Administrative access to chapter Listserv to communicate and engage with chapter members
- Chapter logo with UGA branding
- Monthly Chapter Leader Update emails with important opportunities, resources, and information
- Access to Facebook network of UGA Alumni Association chapter leaders
- Ability to sell UGA Alumni Association merchandise

✕ IN ADDITION, ARCH CHAPTERS ALSO RECEIVE:

- Up to four grant funding applications to be approved annually
- Annual overview of alumni demographics in the area
- Heat map of the number of alumni in the chapter area
- Eligibility for chapter awards at the Alumni Leadership Assembly
- Unique chapter designs created to use with the chapter logo
- Ability to sell merchandise featuring the chapter design and logo



EVENTS

Chapters are encouraged to plan diverse events that engage alumni with various interests. Some alumni are interested in a sporting event, while others are more interested in networking. Being creative with your programming helps get more people involved with the chapter and works to keep them engaged.

Arch chapters must host at least 6 events per year in at least 4 of the following 7 event categories. Pillar chapters have no annual requirements with regards to events, but must hold at least one event per year. Annual and nationwide events are available for all chapters to participate in and will count toward required events for Arch chapters.

EVENT CATEGORIES & IDEAS

✕ ALUMNI CONNECT

An event that allows alumni to connect and engage 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 and other athletic events. These usually occur at a local restaurant or sports bar that will play the game.
- **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:** Gives 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.
- **Local Events:** Activities are going on all around your area, whether they are museum openings, sporting events, community festivals, etc. that will be of interest to alumni. Take advantage of this and create a positive UGA presence.



Charleston Dawgs getting ready to set sail on their annual Sunset Cruise

✕ ACADEMIC INTEREST

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

- **Educational Speaker:** Have a local expert or UGA faculty speaker come to your chapter to speak and educate chapter members.
- **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 & 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.
- **Mentor Matching Night:** Host an event that facilitates the matching of appropriate mentors with interested mentees.



✕ 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 fond UGA memories and encouraging messages 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. More information about Freshman Send-Offs can be found on page 24.
- **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.
- **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. 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 Chapters Scholarship Fund. UGA alumni chapters throughout the country and around the world have joined forces and made a commitment: to create an endowed need-based scholarship to help future Bulldogs. Now, when you designate a portion of event registration as a donation, you're helping ensure that future hardworking UGA students can achieve their goals. 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 designate a portion of the fee to the Chapters Scholarship Fund and use the remainder to 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. More information on merchandise can be found on page 42.

✕ 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. Affinity groups are not limited to these specific groups. If you have ideas for an affinity group, please contact your Alumni staff representative.

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.)

AFFINITY EVENT IDEAS

- **Affinity Networking Luncheon:** An opportunity for an affinity group to gather for business lunch and network with each other in a more intimate setting.
- **Affinity Book Club:** A recurring meeting of an affinity group to discuss, debate, and review a chosen piece of literature.
- **Affinity Happy Hour:** A gathering of an affinity group to socialize and bond over common interests.

✕ 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. Nationwide events include:

- **Game Watching Parties:** Never bark alone! Host game watching parties during athletic events for the chapter to gather and watch the game with local Dawgs.
- **Freshman Send-Offs:** Just before school begins, chapters help to host first-year UGA students in a celebration of the beginning of their time in the UGA community. These events may be contingent upon the number of incoming first-year students from the area. *These events occur during the summer*
- **“Welcome to the City!”:** Following commencement, Welcome to the City is a nationwide event to welcome young alumni and those who have recently moved to the alumni network in their city. *These events occur during the summer*
- **Dawg Day of Service:** Each chapter chooses a service opportunity in their area. *These events occur during the spring*

✕ DOUBLE DAWG DARE PROGRAM

The Alumni Association double-dawg-dares you to host the following events in your chapter area! These events will be worth double points for Arch chapters when hosted in the designated month.

- **January:** Give that Dawg a Bone Campaign or Founders Week Celebration
- **February:** Alumni Leadership Assembly
- **March:** Host UGA IMPACT Students or have UGA Scholarship Day
- **April:** Nationwide Dawng Day of Service
- **May:** Women of UGA Lunch
- **June:** Day at the Museum
- **July:** Freshman Send-Off
- **August:** Welcome to the City
- **September:** Game Watching Parties
- **October:** SEC Networking Social
- **November:** Lunch and Learn
- **December:** Chapter Holiday Party

More information about the Double Dawg Dare Program can be found online under the Chapter Leader Resources page.



Chicago Dawgs participating in the annual SEC flag football tournament.



PLANNING EVENTS

✕ EVENT REQUEST FORMS

Chapters must submit an Event Request Form for all events. Event request forms can be found on the Chapter Leader Resources page and 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 must be submitted **eight weeks** in advance and do not require the submission of an additional Event Request Form.

THE EVENT REQUEST FORM ASKS FOR ALL RELEVANT DETAILS, INCLUDING:

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

ONCE THE EVENT REQUEST FORM HAS BEEN 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
- Arch chapters are awarded points for the event

✕ EVENT PLANNING 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 event does require grant funding, submit a grant application by the grant deadline (p. 33)

1-2 MONTHS BEFORE THE EVENT

- Contact venues and vendors
- Give your chapter time to draft contracts and send them to your alumni association staff contact to be signed
- Make a save-the-date post on chapter social media pages for chapter members

3-6 WEEKS BEFORE EVENT

- Submit an Event Request Form
- Submit contracts 6 weeks before event
- Begin to advertise the event through the chapter Listserv, social media, and by word of mouth

AT THE EVENT

- Chapter board members should serve as hosts at events
- Welcome everyone as they come in and be sure to connect with new faces
- Encourage all attendees to fill out the sign-in sheet and opt into the chapter Listserv
- If necessary, handle sign-in duties such as taking money, handing out drink tickets, etc.
- Take photos to post on social media

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
- Send the sign-in sheet to the Alumni Association for record keeping
- Thank the chapter board members who helped with the event
- Share photos from the event on social media and send to Alumni Association staff
- Email or call you Alumni Association contact to let them know how the event went and let them know of any issues



SPONSORSHIPS & GIFTS

✕ CHAPTER RECOGNITION & SPONSORSHIPS

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 note that sponsorship approval is subject to review and approval from Alumni Association staff and must align with the mission of UGA.*

✕ 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. Please note we are unable to pay speakers to attend events. This applies to both non-alumni and alumni speakers. However, speakers are able to donate their time and service for gift credit.

OTHER THINGS TO KNOW

✕ HANDLING 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 check payable to the UGA Alumni Association.
- Mail the check and receipt carbon copies to the Wray-Nicholson House to the attention of your Alumni Association staff contact.



The Metro Atlanta Dawgs pose for a photo at UGA Night at the Braves.

✕ TICKETED EVENTS POLICY

Chapters have the opportunity to coordinate events that involve tickets (athletic events, performances, etc.). Ticketed events often take longer than other events to coordinate, so chapter leadership should consider this when planning these events. If advanced tickets need to be purchased, consider the following:

- If it is possible for chapter members to order tickets individually via a venue-owned website, this option should be utilized first.
- **Event Request Forms for ticketed events must be submitted six weeks prior to the event.**
- Chapter leaders must ask the venue to complete a W-9, which needs to be submitted alongside the Event Request Form.
- If the venue does not offer group ticket orders through their own website but requires pre-ordered bulk tickets, chapter leaders should work with the Alumni Association to determine quantity and price of tickets. We encourage chapter leaders to be realistic in regards to attendance expectations for ticketed events. When in doubt, order fewer tickets to minimize the financial impact.
- If bulk tickets must be purchased in advance of the event, chapter leaders must use the Alumni Association to pay for the tickets.
- If all tickets are not sold, funds will be deducted from annual chapter funding.

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

✕ DONATIONS & REGISTRATION FEES

Events cannot have registration fees that are “donation only” (e.g. \$5 gift to a scholarship to register). If you have any questions about event registration policy, please contact your Alumni staff representative.

✕ CONTRACTS

Send all contracts to the Alumni Association at least six weeks before the event. This process prevents chapter leaders from becoming personally liable for the contract.

✕ RAFFLES

Some groups may want to host raffles or events with door prizes to raise money to benefit UGA. While raffle laws differ by state, under Georgia law generally, gambling is illegal. “Gambling” includes raffles or door prize events where participants pay for a chance to win an item of value. Due to the complications and advanced permitting processes required to host raffles, it is the best practice of the UGA Alumni Association not to allow raffles as a fundraising activity. Please contact a Chapters staff member if you have any further questions.

✕ DOOR PRIZES

Chapters can choose to give away free door prizes at free chapter events. Please note that door prizes cannot be given away at any event that has a registration fee or where there is a cost of admission. 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. Please remember:

- Advertising or referencing alcoholic beverages on official UGA-branded communications is strictly prohibited.
- Do not serve alcohol to any individual under 21 years of age.
- A designated bartender must serve alcohol.
- Ensure food and non-alcoholic beverages are available to attendees.

✕ 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 FERPA 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.

FINANCES

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 will confirm the chapter’s annual funding allocation once a Chapter Charter Application is received. Official guidelines for M&IE Tiers can also be found on the General Services Administration website at www.gsa.gov.



SUPPLEMENTAL FUNDING & GRANT FUNDING

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.

✕ SUPPLEMENTAL ANNUAL CHAPTER FUNDING

Chapters can apply for more annual funding through the Supplemental Annual Chapter Funding Application on the Chapter Leader Resources page. 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. Additional money for a single, larger 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 at least eight weeks before the date of the event. Arch chapters may submit up to four grant requests per year; Pillar chapters may submit one.

Grant funding applications will be reviewed by the Alumni Association staff and submitted to the Alumni Association administration for approval. All requests over \$2,500 will be reviewed by the Chapters Committee of the Alumni Association Board of Directors, which will take an additional week.

Grant funding applications are most successful when the event achieves 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 area chapter and constituent group

✕ REQUIREMENTS FOR GRANT FUNDED EVENTS

Grant funding applications must be submitted at least eight weeks in advance. This is a strict deadline. Registration for events will not open until all contracts from vendors are reviewed, approved, and signed by UGA. Please keep in mind that this process can take two to four weeks.

Grant funding requests must include an estimate for total requested funding, not to be exceeded without further Alumni Association approval. It is important to note that if 50% of request is not made in revenue, the chapter may lose its ability to request future grants for the remaining calendar year. Future grant funding for events will be contingent upon the accurate documentation and timely submission of all invoices and receipts after the event. Grant funds are not added to the annual chapter funding total if not used to completion.

A minimum gift of \$5 to the scholarship fund of your choice must be included in the registration fee for all grant funded events. 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.

PROCESSES FOR SPENDING CHAPTER FUNDS

Chapter funds can be used through direct payment of the vendor or reimbursement of a chapter leader for event expenses. Whenever possible, direct payment of the vendor is the preferred method of payment. If you have an event and a vendor needs to be reimbursed, any payment from UGA or the UGA Foundation requires that the vendor be set up in the UGA system for payment. The IRS requires that UGA has a W-9 on file for every vendor. All payment forms are available online on the Chapter Leader Resources page.

✗ DIRECT PAYMENT OF VENDOR

1. Send the following items to the Alumni Association at least 6 weeks before the event:
 - a. Invoice
 - b. W-9 from vendor
2. Alumni Association mails a check to the vendor.
**Please note it takes 2-3 weeks to process and send a check*

✗ REIMBURSEMENT OF CHAPTER LEADER

1. Chapter leader pays for expenses
2. Send the following items to the Alumni Association:
 - a. Copy of the paid receipt
 - b. W-9 (requires social security number)
 - c. Honorarium
 - d. List of attendees
3. Alumni Association mails a check to the chapter leader

APPROVED USES & UNAPPROVED USES OF CHAPTER FUNDS

✗ APPROVED USES:

EVENT SUPPLIES

- Light hors d'oeuvres for chapter events (this does not include providing food at board meetings)
- Gift for a visiting speaker (excluding gift cards)
- 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

(Only available for Arch chapters, see Guidelines for Trademarks, Logos and Merchandise)

- Business cards (also available for Pillar chapters)
- Bumper stickers
- Koozies to distribute at chapter events



COMMUNICATIONS

✗ UNAPPROVED USES:

Try not to use large percentages of your annual funding on low-impact, low-registration, or chapter-leadership-only events. Annual chapter funding comes from the UGA Foundation, and the Foundation does not approve of certain uses of this funding. Unapproved uses of annual funding and expenses we cannot reimburse include:

- Donations to other non-profit organizations
- Gift cards
- Alcoholic beverages
- Food at chapter board meetings
- Speaker Fees
 - ✗ We encourage guest speakers, however they must be willing to donate their time to UGA
- Gifts for all event attendees
 - ✗ Giveaways can be requested through the Event Request Form
- Cost-to-participate events exceeding \$10/person
- Spending all annual chapter funding on one event
 - ✗ Use grant funding for large expenditures!



RVA Dawgs host a dinner for UGA Students participating in the IMPACT Service Break Program.

LISTSERV

A Listserv is an email tool that allows chapter leaders to send an email to many people in a particular area. 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.

The following sentence must be included in all Listserv communications:
"To unsubscribe from this list, please email alumnichapters@uga.edu."

✗ 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.

If you have trouble sending messages over the Listserv, please contact the Alumni Association staff for help.

✗ HOW DO PEOPLE SIGN UP FOR THE LISTSERV?

Alumni and friends can opt in to the Listserv by providing their email addresses to a chapter leader or signing up through the link on each chapter's web page. You are encouraged to have a sign-in sheet at each event that provides an opportunity for attendees to opt-in to the Listserv (available on the Chapter Leader Resources page). The Alumni Association can send an email to all constituents in your chapter area to encourage them to sign up for the Listserv. Individuals cannot be involuntarily added to the Listserv. 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.

✗ OTHER LISTSERV 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!



EVITES

Chapter leaders can have an evite created for any chapter event. Evites are sent to all UGA constituents (alumni, family and friends) within the chapter area to promote a chapter event. 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 Event Request Form must be submitted at least two weeks prior to the event to guarantee an evite can be sent.

Chapter leaders have the option to not request an evite, but Event Request Forms must be submitted for all events. If the chapter elects not to use an evite, the event will be listed on the chapter web page but must be promoted by the chapter exclusively through social media and Listserv communication. Nationwide events do not require an Event Request Form and evites will automatically be sent to all participating chapter areas.



New York City Chapter preparing for a feature on ESPN College Gameday.



WEB PAGES & SOCIAL MEDIA

✕ 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.

✕ SOCIAL MEDIA

All chapters must consistently maintain an active Facebook page or group that is active at least monthly. Having a strong social media presence is a great way to communicate directly with chapter members, show the personality of the chapter through pictures and announcements, and create an online community for UGA alumni and friends in your area. For Arch Chapters, Facebook pages need to be active weekly. Facebook pages must have the appropriate chapter logo.

Chapters are permitted to have any/all social media they would like, including Instagram, LinkedIn, Twitter, etc. Alumni Association staff must have administrative access to all chapter social media pages. If you would like additional tips for using social media, please visit the Chapter Leader Resources page online.



CHAPTER MERCHANDISE

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 have a unique chapter image or design that can be used on merchandise, called a chapter design. Chapters can create the designs themselves or work with the Alumni Association to have one created. All chapter designs must follow the guidelines for trademarks, logos, and merchandise and must be approved by the Alumni Association for legal approval.

✕ GUIDELINES FOR TRADEMARKS, LOGOS & 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 Fermata Partners licensed vendor. A list of these vendors is available online on the Chapter Leader Resources website.

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.



POINTS & CHAPTER AWARDS

✕ T-SHIRTS

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 create chapter T-shirts. T-shirts featuring chapter designs are only available for Arch chapters.

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

✕ BUSINESS CARDS

Chapters may use business cards to advertise social media pages, engage new members, and to promote the chapter to local alumni. All business cards should include information about social media platforms and 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

Throughout the year, Arch chapters can earn points to qualify for the Chapter of Excellence, Emerging Chapter, and Chapter of the Year awards. Points are awarded as followed:

Majority giving participation by chapter leaders	5 points
Completing the Chapter Charter Application	3 points
First Chapter Event in each category	3 points
Additional Chapter Events in each category	1 points
Collecting event sign-in sheets	1 points

Double Dawg Dare events are worth double the 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. The Chapter of Excellence award does not require a nomination. Nomination forms and deadlines are emailed to chapter leaders each year. Scoring rubrics and award criteria can be found on the Chapter Leader Resources page. All nominations will be reviewed by the Alumni Board of Directors Awards Selection Committee and will be announced at the annual Alumni Leadership Assembly.

✕ 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 their leadership impacts the chapter area, and how they support and connect alumni.

NOMINEES WILL BE SCORED BASED UPON THE FOLLOWING CRITERIA:

- Attitude
- Dependability
- Dedication
- Creativity
- Overall Effectiveness

✕ 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, and how the event supported alumni, the chapter, and UGA.

NOMINATIONS WILL BE SCORED BASED UPON THE FOLLOWING CRITERIA:

- Level of Engagement
- Diversity of Events
- Impact
- Unique and Innovative
- Marketing and Outreach



CHAPTER OF EXCELLENCE, CHAPTER OF THE YEAR & EMERGING CHAPTER OF THE YEAR

All Arch chapters are considered for Chapter of Excellence, Chapter of the Year, and Emerging Chapter of the Year. Unlike Event of the Year and Volunteer of the Year, these are not nomination-based awards because all Arch chapters are automatically considered.

✕ CHAPTER OF EXCELLENCE

Recognizes chapters that have excelled within the expectations laid out by the Alumni Association. To earn this award, a chapter must meet all Arch chapter requirements, earn a minimum of 20 points during the year and maintain an active Facebook page with at least one post per month.



RESOURCES & SUPPORT

✕ 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 majority giving participation by the chapter board, and have had at least one chapter representative attend the previous year's Alumni Leadership Assembly.

ALL ARCH CHAPTERS WILL BE CONSIDERED AND SCORED BASED UPON:

- Number of Events
- Diversity of Events
- Marketing and Outreach
- Chapter Giving
- Alumni Engagement

✕ EMERGING CHAPTER OF THE YEAR

Recognizes chapters that have made significant steps in the development of their chapter. To be considered for this award, the chapter must have greatly expanded their annual programming, alumni engagement, and/or communication strategies.

ALL ARCH CHAPTERS WILL BE CONSIDERED AND SCORED BASED UPON:

- Number of Events
- Diversity of Events
- Marketing and Outreach
- Chapter Giving
- Alumni Engagement

CHAPTER LEADER RESOURCES WEBSITE

www.alumni.uga.edu/chapters/chapter-leader-resources/

The online Chapter Leader Resources web page has additional information and helpful forms that will be useful to you as a chapter leader. Please refer to this page for all forms you will need, including the Chapter Charter Application, event request form, reimbursement forms, etc. These resources are updated throughout the year, so be sure to check this page periodically for updates.



UGA CHAPTER LEADERS FACEBOOK GROUP

www.facebook.com/groups/UGAChapterLeaders/

This Facebook group is a great networking tool for chapter leaders around the world. Chapter leaders use this space to post pictures, give updates, network, and share ideas that have been successful with their chapters. If you have difficulty accessing this group, please email Alumni Association staff for assistance.

