



Alumni Association

UNIVERSITY OF COLORADO BOULDER

Alumni Chapter Manual and Memorandum of Understanding

This manual provides information on chapter structure and goals, the requirements for establishment, and ongoing support from the Alumni Association. Included are resources and information to support the growth of each chapter.

Agreement with the terms and conditions within this manual is mandatory for all recognized CU Boulder alumni chapters.

All chapter leaders must return the final page of this manual, completed and signed, to the Alumni Association. Any chapter that does not agree to the terms and conditions within this manual will not be considered a recognized, official University of Colorado Boulder chapter.

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Welcome

Dear CU Boulder chapter leader,

I want to personally thank you for the incredible work you do as a chapter leader, volunteering your time to strengthen the Forever Buffs family. The chapter program and the work you do is vitally important to the university and the Alumni Association, and forms the heart of our initiatives to inspire all current and future alumni to develop a lifelong relationship with the university and one another.

Thank you for the role you play in encouraging alumni to engage with and contribute to the university and celebrate their CU pride. We have nearly 40 chapters around the world from Shanghai to San Francisco to Saudi Arabia. Some groups are very active, hosting dozens of events per year. Others hold a handful of events with one alumni leader serving as a point of contact for the Alumni Association. No matter what the size of your group, we hope this chapter manual will offer guidance on everything from event planning to social media best practices. Please feel free to share it with the other alumni volunteers with whom you work.

In 1935 CU President George Norlin gave a commencement speech that became known as the Norlin Charge, which we read at all commencement ceremonies. Part of the Norlin Charge applies directly to you and what you do across the country and world on behalf of CU Boulder. He said, “The university consists of all who come into and go forth from her halls, who are touched by her influence and who carry on her spirit. Wherever you go, the university goes with you.”

In serving as a chapter leader, you are bringing the university to your corner of the world. Thank you for your passion, enthusiasm and commitment to CU Boulder. I am honored to be part of the extraordinary Forever Buffs family and look forward to working with you!

Sincerely,



Ryan B. Chreist

Assistant Vice Chancellor and Executive Director, CU Boulder Alumni Association

Introduction

What is a Chapter?

An alumni chapter offers opportunities for alumni in a specific geographic region to connect based on their passion for the University of Colorado Boulder. A chapter is a community of alumni that come together to celebrate their alma mater wherever they may roam, and act as local advocates for CU Boulder.

For more information on individual chapters, please contact Rebecca Reifel, Senior Chapters Manager, at rebecca.reifel@colorado.edu or visit our website: www.colorado.edu/alumni/connect/chapters-clubs

Alumni Association Purpose, Vision, and Mission

Purpose

The CU Boulder Alumni Association's purpose is to inspire all current and future CU Boulder alumni to develop a lifelong relationship with the university and one another.

Vision

To be recognized as the premier alumni association among peer institutions, setting the standard for best practices and innovative approaches to alumni engagement.

Mission

To design, develop and execute innovative strategies for Alumni Association activities that will significantly increase the involvement of current and future alumni with the university.

Chapter Support Role for Alumni Association Vision, Mission and Goals

Purpose

The chapter's purpose is to be the foundation for engagement by providing innovative events and opportunities for alumni to connect with the university, the Alumni Association, and with one another.

How chapters support the Alumni Association mission:

- Act as advocates for the University of Colorado Boulder
- Facilitate CU Boulder events and programming focused on increasing involvement within all alumni age groups and for diversified interest areas
- Foster a spirit of camaraderie and sentiment among alumni who reside in common regions and/or share similar interest

- Inspire and support students in attending CU Boulder through scholarship programs
- Respond to inquiries from the Alumni Association, other volunteers and alumni promptly

Goals

- To encourage alumni and friends of CU Boulder to maintain an active relationship with the university and with each other
- To serve alumni, parents and friends by:
 - Providing social and professional networking opportunities through events and activities within their own communities
 - Helping Forever Buffs to stay connected to CU Boulder by keeping them informed about major university events or simply by providing the opportunity for alumni to share their campus memories and experiences
 - Providing enrichment or educational programs that provide lifelong learning opportunities
- To serve our university by:
 - Helping alumni stay involved with the university
 - Providing feedback to the campus through the Alumni Association
 - Serving as ambassadors of the university to their communities
 - Providing funds for student scholarships (not all groups participate in the scholarship program)

Benefits of Being a Recognized Alumni Chapter

Promoting CU spirit across the country and world, growing your leadership skills, networking with fellow alumni – these are many of the reasons why joining as a leader and creating a local CU Boulder alumni chapter in your city is so important. When you team up with the Alumni Association our staff of professional event planners, marketers and volunteer managers will provide the resources to make sure that your chapter succeeds.

As an official chapter, your chapter will be eligible to receive the following benefits:

Marketing Benefits

1. Access to send emails to the Alumni Association and university database
2. Access to post to CU Boulder branded social media accounts specific to the chapter and local audience
3. Oversight of content on a branded chapter web page on the Alumni Association website
4. Use of “Forever Buffs” branding
5. Use of the Ralphie logo for spirit-related marketing
6. Use of the interlocking CU logo for spirit-related marketing
7. Access to a “your city”@colorado.edu forwarding email address

8. Approval from the university to name the group an official “chapter”

Event Planning Benefits

1. Event support from the Alumni Association, including event planning, financial assistance and professional staffing (when available)
2. An annual swag/giveaway delivery for watch parties and other chapter events, with items ordered exclusively for alumni chapters
3. A Forever Buffs chapter city-branded CU flag
4. Access to post on the university event calendar for chapter events
5. Eligibility to apply for the Chapter of the Year Award through the Alumni Association

Chapter Leader Benefits

1. All chapter leaders are invited to attend Leadership Weekend, hosted every spring in Boulder, which provides exclusive training and networking opportunities.
2. Chapter leaders are invited to university events that may take place in your respective city, hosted by all the schools and colleges, to attend as chapter representatives. You may be asked to speak as part of the program to encourage alumni to participate in chapter activities.
3. Access to webinar and social media trainings for chapter leaders through the Alumni Association
4. Athletics ticket giveaways (when available) during Homecoming, leadership weekend and other sporting events on-campus and on the road through the year

Chapter Relationship with Alumni Association

As separate entities, chapters are “registered” by the CU Boulder Alumni Association through a set of guidelines and best practices. Chapters are asked to notify the Alumni Association of their purpose and interests and must comply with the rules and regulations set by the Alumni Association. To be considered an official chapter, group leaders are required to submit the following completed documents to the Alumni Association, on an annual basis:

1. Signed and agreed to Memorandum of Understanding (last page of Chapter Manual)
2. Volunteer Board Roster

While the Alumni Association and respective Alumni Association liaison can provide support for each chapter there are restrictions on what the Alumni Association can do for chapters and its leaders.

Due to university policy and financial constraints, the Alumni Association **cannot** do the following for chapters:

1. Sign contracts
2. Hold liability for finances, events or functions

Additional information regarding financial responsibility and support can be found in the “Resources” section of this document.

Starting an Alumni Chapter

Chapters can be formed in one of two ways:

1. A group of CU Boulder alumni take the initiative.
2. Based on current societal trends, the Alumni Association takes the initial steps to form a group and seeks out alumni volunteers.

Steps to become a Chapter:

1. Initial Request:
 - Check the Chapters page on the Alumni Association website to ensure that the group you wish to create does not already exist.
2. Contact the Alumni Association to request to start your new chapter:
 - Contact Rebecca Reifel, Senior Chapters Manager, at rebecca.reifel@colorado.edu.
3. Informational Meeting/Call:
 - The Alumni Association liaison assigned to your chapter will contact the alumnus/alumna who made the initial request to discuss the proposed alumni group.
 - The discussion will include the individual's relationship to CU Boulder, number of other alumni who are interested in forming the group, the list of alumni associated with the proposed group (if applicable), affiliations with other organizations, related student groups, ideas for events, etc.
 - The Alumni Association liaison will provide a number of contactable alumni within the selected region. Cities/regions that contain more than 200 contactable alumni are eligible to start a chapter.
 - In some cases, the alumni population in a city may be too small to sustain a chapter. The Alumni Association liaison will discuss volunteer options within that market if the population won't support an official chapter.
4. Submission of Required Materials:
 - After the follow-up meeting, the primary alumni contact will gather the necessary requirements and submit them to the appropriate Alumni Association liaison.

5. Approval:
 - Once all materials are received, the Alumni Association will review the documents and approve the organization for listing on the Alumni Association website
6. Contact your fellow Forever Buffs:
 - Work with the Alumni Association to understand the system and process for sending emails to alumni in your market and to get your social media channels established.
 - Send out your first e-mail, using resources available to you at the Alumni Association, and start making connections and friends. Stay in touch through social media

Initial Charter Requirements

These requirements are necessary to start your chapter, maintain your charter and reap all the benefits associated with being a registered CU Boulder Alumni Association affiliated group.

Population Requirements

To initiate an alumni chapter, there should be a core group of alumni who have demonstrated an interest in establishing and maintaining the group as chapter leaders (see “Chapter Tiers” section for more information). In addition, each group must have a **minimum of 200 emailable** alumni in their region (within an approximate 50-mile radius of the city center).

Structure

While it is not required that a chapter hold a specific structure (e.g. board of directors, committees, etc.), it is highly recommended that all chapters, regardless of size, level of activity, and complexity develop a leadership team, or steering committee, to ensure that:

- Responsibility for planning and implementation of events and outreach is distributed in manageable portions.
- Diversified program planning is developed that is responsive to the variety of interests and needs of targeted alumni.

Some key positions that are suggested include:

- Chair or Co-Chairs: point person for all major information
- Secretary: to maintain notes and meeting minutes
- Communications: for email or social media maintenance
- Treasurer: to manage event and operating funds
- Committee Chairs: to lead specific committees, i.e. Sports Event Committee

For recommendations on the number of leaders your group should have based on the size of your group, please see “Chapter Tiers” section.

Succession

Chapter leaders should engage continually in succession planning – identifying, training and motivating new leaders. Term limits, election or selection cycles, and training can all be included in the group’s governing document.

Implementing the following best practices will encourage successful continuation of the group's leadership:

- Use the committee approach to get work done so that the board isn't solely in charge. Committees also help with identifying and developing future leaders.
- Name committee vice chairs. Vice chairs are the committee chairs the following year, but could fill the position in an emergency.
- Overlap committee assignment terms with board/officer assignments. For example, you could have board/officers on fiscal-year terms with committee assignments on calendar-year terms.
- Increase your board size to increase your pool of potential candidates. Organize open house events, chapter surveys and open board meetings to identify potential leaders.
- Develop clear job descriptions and evaluations for different leadership positions so your volunteers know what is expected. Include their mentoring and "back-up" duties should another leader suddenly leave.
- Rotate leadership positions on a regular basis to ensure that new talent has a chance to emerge.
- Implement training opportunities for volunteers (i.e. occasional leadership retreats) and encourage your board to take advantage of association resources to train new leaders. Resources include Leadership Weekend, email, social media and website training, regular webinars and individual conversations with the staff liaison.
- Motivate new leaders by assigning them responsibilities in which they are passionate. In the beginning, have experienced board members shadow or co-direct events to provide guidance.
- Put your succession plan in writing — it should be a document for future leaders to follow. This could be an addendum to chapter bylaws.

Governing Document

Each chapter is encouraged to have a written document that will govern the group's operations and activities. This document will serve as a framework for the group to follow, and it establishes important tenets that help minimize the potential for future conflict about the group's operations.

The following should be included in the governing document:

- Mission
- Goals
- Leadership structure
- Succession of leadership
- Membership requirements
- Financial structure and policies (see financial responsibility information in Section V)

a. Group's Mission

All alumni groups should have a written mission statement outlining the purpose for its existence. The mission statement will serve as a guide for future programming and events and inform alumni of the group's direction. Each group's purpose must be aligned with the general mission of the CU Boulder Alumni Association to benefit the alumni community and is subject to review by the Alumni Association.

b. Maintain Governing Document

The constitution drafted by the group and approved by the Alumni Association will serve as a guide for conducting the group's activities. It should be followed consistently, and any changes must be reviewed by the Alumni Association before they are implemented.

Criteria and Requirements for Chapters

Chapter Leader Expectations

The primary leader (president, chair or co-chair) of a chapter has specific duties in that position. Please consider these expectations before agreeing to the position. The primary leader is:

- The main contact between the Alumni Association and the chapter and needs to maintain regular contact with the staff liaison. In most cases that will mean at least once per month communication.
- Responsible to respond in a timely manner (usually 48 hours) to inquiries or requests from the Alumni Association, the university and alumni.
- Responsible for following the group's governing documents and bylaws including holding elections as specified.
- Responsible to maintain the chapter's Charter Requirements as outlined in the "Charter Requirements" section.
- In most cases, required to devote 3-6 hours per month to this leadership position (may require more hours during busy event seasons).
- A positive representative and the chief ambassador in their market for the Alumni Association and the University of Colorado Boulder.
- An active participant in regular chapter board meetings providing positive leadership and direction to the group's board.
- For those chapters that have boards, the primary leader is responsible for:
 - Scheduling and presiding over group meetings allowing other committee members to participate and contribute to meetings.
 - Soliciting agenda items and distributing agenda in advance of meetings.
 - Leading the board in establishing an annual plan and goals for each year.
 - Creating an overall calendar with timelines for each project.
 - Ensuring each project has a lead with accountability for deadlines.

- Assigning responsibilities for individual duties or events and follow up on progress.
 - Appointing committee chairs (if applicable) and assisting with committee member selection.
 - Ensuring that all committees stay on target with specified tasks.
 - Ensuring that chapter publicity, activity reports, attendee reports, minutes, funding requests, year-end survey and photographs are all submitted in a timely manner.
 - Supporting alumni chapter events and programs throughout the year.
- Responsible to understand and uphold the university's branding and reputation management policies.

Chapter leaders are a valued and important extension of the Alumni Association. In this highly visible position, we also ask that all leaders and board members keep the following guidelines top of mind at all times:

- Keep the interest of the chapter and/or Alumni Association foremost in mind when providing assistance and avoid any and all conflicts of interest.
- Adhere to the policies and procedures of the University of Colorado Boulder Alumni Association and ask for clarification if you do not understand them.
- Serve as a positive Alumni Association and university representative and conduct yourself in an appropriate, professional manner.
- Strive to achieve the highest quality and effectiveness in both the process and products of volunteer work without promoting any self-interest or personal gain.
- Be in full, open and honest communication with the Alumni Association.
- Honor and respect other volunteers. Acknowledge and respect the contributions, talents, and efforts of all who participate and treat them equally as peers.
- Keep your word—do what you say you will do. Say yes only when it truly works for you to do what is requested and agree to participate 100 percent in whatever assignment you undertake.
- Do not be afraid to admit you do not know something. Find clarity from the appropriate person before taking action.

The success of the University of Colorado Boulder Alumni Association depends upon volunteers nationwide in a variety of programs. The Alumni Association values its volunteers and works to create services and programs to support and enhance their involvement. However, volunteers of the University of Colorado Boulder Alumni Association conducting themselves in a manner inconsistent with the Association's mission or these expectations may be removed as chapter leaders.

Programming Categories/Pillars of Focus

The Alumni Association has identified four different programming categories for our alumni chapters. These categories are meant to assist our chapters in diversifying their program offerings and creating programs and events that appeal to the many different alumni constituents they serve. Chapters should plan events/programming in support of these pillars to strengthen the alumni community, the Alumni Association and the university brand within their communities.

a. Professional

Alumni chapters offer a valuable career network for alumni within their region or special interest area. Professional programs facilitate networking among alumni, engage young alumni that are new to the community, and strengthen the value of a CU Boulder degree. In addition the local chapter can enhance career opportunities for alumni through references and job opportunities.

Program Examples: Networking nights/luncheons, speakers.

b. Social

Alumni chapters are the local CU Boulder spirit squad within their regions. Social programs allow alumni of all ages to gather socially and stay connected both with the university and fellow alumni. These programs also generate CU pride within each chapter region and provide an easy way to welcome alumni that haven't been involved with the chapter community.

Program Examples: Watch parties, social gatherings, sport-related events, signature events, arts and cultural events, lifelong learning events.

c. Community Service

Alumni chapters are advocates for the university within their regions. Community service events strengthen the CU brand within the region and offer an additional recruitment strategy for the institution.

Program Examples: Community service, park cleanups, food drives, clothing donations and events related to the annual "Buffs Give Back" programming every May.

d. Philanthropy (Scholarship)

Alumni chapters give back to the institution and work to build value and equity in a CU Boulder degree.

Program Examples: Scholarship fundraisers, awards programs for alumni and students.

Chapter Tiers

Tiers have been established to better meet the needs of the various alumni chapters. Chapter tiers are based on alumni population in a given market or special interest area. This will allow us to better serve chapters of all sizes with the tools each needs to reach its local alumni.

Tier 1: 2,000+ emailable alumni

Tier 2: 1,000-1,999 emailable alumni

Tier 3: 200-999 emailable alumni

Characteristics of Successful Chapters

Successful chapters should strive to meet the following goals in each of the listed areas below.

Please note: Chair is defined as chair, co-chair, vice chair and/or committee chair.

a. Tier 1 Chapters

CHAIRS: 3 or more

VOLUNTEERS: 6 or more planning committee members

MEETINGS: 4-6 meetings per year to plan events for the coming year/months

EVENTS: 4-6 events/programs each year, including at least one from each of the four pillars of focus.

COMMUNICATIONS: Updated website, LinkedIn, Twitter, Facebook, effective email communications

b. Tier 2 Chapters

CHAIRS: 2 or more

VOLUNTEERS: 4 or more planning committee members

MEETINGS: 2-4 meetings per year to plan events for the coming year/months

EVENTS: 2-4 events/programs per year, including any from the following pillars of focus: Professional, Social, Community Outreach

COMMUNICATIONS: Updated website, LinkedIn, Twitter, Facebook, effective email communications

c. Tier 3 Chapters

CHAIRS: 1 or more

VOLUNTEERS: 2 or more planning committee members

MEETINGS: 1-3 meetings per year to plan events for the coming year/months

EVENTS: 2-3 events/programs each year, including at least one non-social gathering.

COMMUNICATIONS: Updated website, LinkedIn, Twitter, Facebook, effective email communications

Charter Requirements

In order to receive the full benefits of being a CU Boulder Alumni Association affiliated chapter, all groups must meet the following annual Charter Requirements:

- a. Communicate: Make sure that you are responding regularly to all inquiries from both alumni and the Alumni Association. Chapters who are unresponsive for longer than 6 months will be labeled as inactive.
- b. Return Memorandum of Understanding: All chapters are required to submit a signed and agreed upon Memorandum of Understanding to the Alumni Association. These memos must be signed annually to remain active.
- c. Maintain Branding Standards: Maintain the branding requirements of the university and the Alumni Association on all communication outlets. Templates and basic standards are available for each tool.
- d. Adhere to Chapter Leader Expectations: Make sure to uphold all of the expectations of our chapter leaders. These are in place to make you a more successful leader.
- e. Return ALL Event Data to the Alumni Association: By returning event data to the Alumni Association in a timely fashion, we can better track what and why alumni are attending your programs. Submit your attendance sheets using the event tracking form available on the Chapters and Clubs resources webpage. This will help you better target and build new programs.
- f. Participate in Leadership Weekend or Webinar Trainings: We know that not all of our volunteers will be able to attend our leadership weekend, but we highly recommend participating. Plus, we will be providing additional trainings via webinar throughout the year that we hope your board members and leaders will take part in.
- g. Diversity Your Programming: Set goals to host events in different pillars of focus. By providing alumni in your area with a wide range of events and activities, you will attract a diverse group of alumni and strengthen your community.

Chapter Awards

Each year, the CU Boulder Alumni Association will give a “Chapter of the Year” award to the most deserving Forever Buffs alumni chapter at the Alumni Awards Ceremony during Homecoming Weekend. To be considered for this award, a completed nomination form must be submitted to the Alumni Association. The form and applicable deadlines will be emailed to chapter leaders each summer.

Award Criteria

The “Chapter of the Year” award will be open to all recognized alumni chapters, regardless of tier, membership numbers or activity level. Selection of the winner will be made by the Alumni Association, in consultation with a non-partisan committee made up of Board of Advisors volunteers, based on the following areas of focus:

NEW AND INNOVATIVE PROGRAMMING

Chapters that develop a new and innovative program can choose to submit for consideration. An event that is new to the chapter and that falls into the professional development, community relations or philanthropy pillars of focus is a qualifying event. The event cannot be purely social in nature.

OR

RECRUITMENT

Chapters that have unique and effective recruitment strategies can choose to submit for consideration. Recruitment can cover the chapter board – how the group recruits and maintains board membership, structure, unique training opportunities, professional development, etc. Recruitment can also mean how a chapter increases participation rates at their general events.

Recognition

The winning chapter will receive \$1,000 from the Alumni Association to be spent on goods and services for the chapter. See “Funding Opportunities from the Alumni Association” for more information.

The chapter will receive a Chapter of the Year banner to hang at events.

An announcement will be placed on the CU-Boulder Alumni Association website.

Chapter leadership will be invited to the Alumni Awards Ceremony during Homecoming Weekend for public recognition of the award.

Finances

Financial Responsibility

The Alumni Association, which includes our recognized chapters, is a non-dues paying organization. Chapters are not permitted to charge membership dues in any form.

The services and support provided by the Alumni Association to chapters at no cost, combined with careful planning to appropriately charge event fees to attendees as needed, should allow most chapters to operate without the need for additional fundraising for operations.

The Alumni Association *strongly discourages* chapters from soliciting general financial contributions from alumni for anything other than a scholarship fund. If you believe your chapter is in need of additional operating funds, please speak with the Alumni Association first to determine the best approach to meet your needs. The association may be able to cover upfront costs that will be reimbursed by attendance fees.

If the chapter pursues sponsorship opportunities, sponsors must be approved by the Alumni Association first to ensure they fall in line with university guidelines and do not otherwise hinder any other existing activity or relationships. Strict guidelines exist for links, logos and mentions of sponsors, so please work with your liaison to ensure compliance with all standards.

The Alumni Association **cannot fully fund** chapters. All groups should operate as close to a break-even basis as possible. Groups can build operating funds through events by charging attendance and fees. See the event planning section below for additional support.

Should your group decide to create an operating fund or sponsor events that will require an attendance fee, finding a volunteer to serve as a treasurer will be essential. This should be included in the group's governing document.

Chapters cannot charge membership fees. The Alumni Association is a non-dues paying organization and, by extension, so are the chapters. Please contact your liaison if you have questions about ways to raise operating funds.

Funding Opportunities from the Alumni Association

The Alumni Association can help your group fund an event or program in three ways:

1. Request funding based on your tier level
 - i. All tiers are assigned a grant allotment which each chartered group can use for financial assistance (outlined below).
 - ii. Funding will be provided as direct payment from the Alumni Association to a specific vendor. The Alumni Association cannot provide reimbursements or cash payment to individuals or chapter leaders.
2. Request support to cover a deposit.
 - i. The Alumni Association can cover a deposit required for event space or tickets, with the agreement that all funds will be returned to the Alumni Association.
3. Winning the Chapter of the Year Award
 - i. All chapters (of any tier) will be able to apply for consideration for the Chapter of the Year Award. The winner, announced at the Alumni Awards Ceremony during Homecoming Weekend, will receive a financial gift from the Alumni Association to spend towards chapter activities (approval from the chapter's liaison and Alumni Association is required).
 - ii. Chapter of the year gift: \$1,000 (available for 1 year following award acceptance)
 - iii. Funding is provided as a direct payment from the Alumni Association to a vendor for goods and/or services. The Alumni Association cannot provide reimbursements or cash payment to individuals or chapter leaders.
 - iv. See the "Chapter Awards" section for additional information and criteria for nomination.

Grant Funding Allotments:

Grant funding will be available to all recognized chapters each year on a fiscal year basis. The university's fiscal year runs July 1-June 30. Unused funding cannot roll over into the next fiscal year. Funding can be split into different payments, it does not need to be used in one payment.

Tier 1 (2,000+ emailable alumni): \$2,000

Tier 2 (1,000 – 1,999 emailable alumni): \$1,000

Tier 3 (200 – 999 emailable alumni): \$500

All funding requests need to be made through a direct request to the chapter's liaison. In many cases, the liaison will ask for a grant proposal which should include the exact amount requested, purpose, vendor information for payment and a brief description of how this event is new and innovative for the chapter and/or will attract new alumni to participate. Please

remember that all chapter programs should operate as close to break-even as possible. All funding support is built to help groups reach that goal.

Grant funding **cannot** be used for the following purposes:

- To purchase alcohol
- To fund a chapter's scholarship account
- To pay an individual for reimbursement
- To pay a speaker or special guest (unless they have filed W2 paperwork and are an approved vendor of the University of Colorado)
- To pay a non-refundable music act (band, singer, etc.) prior to the event

Tax Liability

Chapters, by legal definition, are considered separate entities from the University of Colorado Boulder and the Alumni Association. Any revenue taken in by the chapter may be considered taxable income at the state or federal level, and the chapter leadership is responsible for filing state and federal tax returns on this income.

The University of Colorado Boulder and the CU Boulder Alumni Association cannot be held responsible for any tax liability accrued by chapters. Chapters should build funds into their operating budgets to help cover these liabilities.

Income – External System

All chapters may choose how to accept money through events, ticket sales, fundraisers, sale of merchandise, etc. If the chapter leadership chooses to use an external company or system (example: EventBrite, PayPal) to process income, and the chapter is not a registered nonprofit organization with their local and federal government, that income will be reported on an IRS Form 1099-K (Payment Card and Third Party Network Transactions) and may be taxable. Failure to declare the income reported on the IRS Form 1099-K may result in receiving correspondence from the IRS and the ultimate imposition of penalties and interest charges. Chapter leaders are responsible for this tax liability.

Income – Internal System

The University of Colorado Boulder and, by extension, the Alumni Association is a registered 501(c)(3) nonprofit organization recognized by the State of Colorado and the U.S. federal government. Recognized chapters may choose to use the Alumni Association's payment processing system to avoid personal tax liability when the chapter takes in money for events, fundraisers, sale of merchandise, etc.

The following rules and regulations apply to funds that are accepted through the Alumni Association on behalf of registered chapters:

1. The university cannot issue a check, make a payment or provide reimbursement directly to an individual or chapter bank account.

2. Payments from the Alumni Association can only be sent to approved vendors for goods and services.
3. Once the Alumni Association collects income on behalf of a chapter, that money must either:
 - a. Stay within a university account
 - b. Be used to pay an approved vendor for goods and/or services provided
4. Money collected through the Alumni Association **cannot** be sent back to the chapter to be used as general operating funds.
5. Money collected through the Alumni Association **cannot** be transferred over to a chapter's scholarship account within the CU Foundation.

Due to the strict regulations around when and how the Alumni Association can distribute money to chapters, leadership must carefully decide how best to handle chapter finances specific to the situation. Please contact your Alumni Association liaison for guidance and additional information about income collection.

Nonprofit Status

The best way for chapter leaders to protect themselves from future state and federal tax liability is to file as a nonprofit corporation in their respective state. Laws, regulations and processes vary from state-to-state. Please contact a financial and/or legal advisor in your state for appropriate guidance on how to file as a nonprofit corporation.

Forming a nonprofit corporation is much like creating a regular corporation, except that nonprofits have to take the extra steps of applying for tax-exempt status with the IRS and their state tax division. Here is what you need to do:

To incorporate as a nonprofit:

- Choose an available business name that meets the requirements of state law.
- File formal paperwork, usually called articles of incorporation, and pay a small filing fee (typically under \$125). You will be provided with an EIN for your chapter.
- Create corporate bylaws, which set out the operating rules for your nonprofit corporation.
- Appoint the initial directors. (In some states, you must choose your initial directors before you file your articles, because you must list their names in the document.)
- Hold the first meeting of the board of directors.
- Obtain licenses and permits that may be required for your corporation.
- Incorporating will provide limited liability coverage for chapter leaders. Consult a local legal expert for additional information.

To file as a nonprofit for tax exemption:

Once a nonprofit corporation has been created, filing as a 501(c)(3) nonprofit with your state and federal government is not required, but is recommended in order to avoid tax liability. For additional information, required forms and next steps, please refer to the following IRS

publication: <http://www.irs.gov/pub/irs-pdf/p4220.pdf>. Consult a tax or financial professional in your state regarding local nonprofit filing requirements.

Opening a Bank Account for your Group

Chapter funds should not be kept in a personal account. The Alumni Association strongly encourages groups to establish a policy for handling chapter funds and accounting procedures.

Having a local bank account allows groups to operate financially independent from the Alumni Association. The following are instructions on how to open a bank account at Elevations Credit Union in Boulder. *Rules and requirements may vary by state and financial institution.*

1. Apply for an EIN number for your chapter at <https://sa!.www4.irs.gov/modiein/individual/index.jcp>. This will allow you to set up the bank account in your chapter name instead of under your personal information. We recommend you choose “view additional types” and become a social/savings club under the identity section.
2. Register your group with the state of Colorado at <http://www.sos.state.co.us/biz/FileDoc.do> or in your respective state. Choose “form a new nonprofit corporation” and enter the official name used during the EIN application process. After you click the entity, you will have spaces to enter the entity information: names, addresses, officers, registered agent, etc. You do not need to have bylaws prior to this and you do not need to have a hard copy of any articles of incorporation. The website will allow you to print the articles at the end and the “form” articles are sufficient.
3. Once you have completed steps one and two you are ready to open a business bank account for your group. You will need at least two signers on the account. The EIN number and bank account information should be sent to your staff liaison at the Alumni Association immediately for auditing purposes.

Resources

Event Planning

Scheduling Events

Group leadership is encouraged to meet in the summer to discuss plans for the upcoming year's events. It is suggested to create an *annual calendar* that all members can reference.

By planning events well in advance, groups can ensure enough time is allowed for:

- Adequate planning and marketing
- Food and venue reservation
- Preventing conflicts with holidays or local events

When deciding on a date and time, be mindful of holidays (including religious holidays), local events and external factors like traffic. Try to pick a date/time that is convenient for the majority of the individuals you hope to attract to the event. All board members should be available to attend events.

Variety

Plan a diversified calendar of events that will appeal to a cross-section of your group's alumni base. Keep in mind the four pillars of programming listed in the Criteria and Requirements for a Chapter Section.

Annual or Signature Event

Consider establishing a signature event that anchors your alumni programming during the year and can become a tradition for alumni in your area.

Communication Tools

Becoming an official University of Colorado Boulder Alumni Association chapter allows your group to utilize some of the communication tools used by the association. These include e-mail, direct mail and social media.

Email Tool

Chapter leaders are encouraged to use the university's email system to contact affiliated alumni, to garner interest and market their events.

The process to request emails:

1. Follow this link: <http://www.colorado.edu/alumni/chapterclub-email-request>
2. Fill out the form:
 - a. Attach desired photos/content
 - b. Select a send date (desired send date must be at least 7 days out so that the Alumni Association has time to build the email and schedule the send. A marketing calendar will help to keep communications organized).
 - c. Select any additional send dates for this specific event/announcement. If you are unsure if you will need a second or third send, schedule it anyway. It is easier to cancel a send than add one later.
 - d. Send dates are subject to change when there are other communications scheduled or if a market is over-saturated with emails during that time. The sooner you submit your request the more likely you will get the desired dates. The Alumni Association will communicate the final send date to you.

3. Submit the form
4. Once submitted, a draft email is sent to you within 48 hours before the send date(s). Please approve/edit within 24 hours of receiving the draft so that it is sent out on time (the Alumni Association reserves the right to make necessary editing to all copy that is submitted in order to keep with brand standards and clarity).
5. The Alumni Association will provide any data on the email send upon request.

Chapter Web Pages

Each recognized chapter is automatically provided with a chapter web page and is encouraged to maintain all content and event promotion on it.

Process to update your web page:

1. Follow this link: <http://www.colorado.edu/alumni/connect/chapters-clubs/chapterclub-website-update>
2. Fill out the form:
 - a. Attach photos/content
 - b. Include as much copy as possible and a description of the update
 - c. Select your chapter liaison
 - d. Note if the update is for an event

Once received, please allow 48 hours minimum for updates to appear on your page. The Alumni Association reserves the right to make necessary editing to all copy that is submitted in order to keep with brand standards and clarity.

Social Media

Social media and social networking concepts and tools have provided many new ways for the Alumni Association to help Forever Buffs connect, contribute and celebrate CU Boulder and one another. Chapter social media is geared toward online engagement and informing Forever Buffs. It does not replace email, it complements it. The chapter social media channels are a very important component of the overall Forever Buffs online community strategy. Therefore, the use of social media is encouraged for many reasons, including:

- It is a less formal way to communicate.
- It may be able to reach constituents that email cannot.
- It is real-time.
- It is in a conversational voice.
- It provides online, two-way engagement year-round that spans events, athletics, etc.

It is important for volunteers to understand the complementary purpose of the main Alumni Association channels and chapter channels. The more the two work in tandem, the more successful they will be.

- **Main Alumni Association Channels:** Extend the campus experience around academics, campus life, athletics, nostalgia, alumni recognition and chapter awareness and build awareness of association events, programs and services.
- **Chapter Channels:** Involve the Forever Buffs community through a combination of CU Boulder chapter engagement opportunities (events, programs, etc.).

In order to help keep chapter pages active, the Alumni Association reserves the right to post on all official chapter pages. Many of these posts are automated and are scheduled every Tuesday before noon.

Policies

To maximize the continuity of the user experience across all CU Boulder channels, it is critical for standard and consistent graphics and wording to be used. As an editor of a chapter social media channel you are representing CU Boulder. Please keep in mind all of the following policies when utilizing social media in the name of your chapter:

- Do not create a new channel without speaking with your Alumni Association liaison. All social accounts will be created by the main online community manager.
- Do not add editors or change passwords without approval from the Alumni Association.
- Provide the Alumni Association with all accounts/passwords used to manage chapter social channels.
- Do not use chapter social channels for personal advertising.
- Do not promote a business on the channels. Exceptions may include a thank you for sponsorship or hosting.
- Do not post unauthorized commercial solicitations (such as spam); bully, intimidate, or harass any user; post content that is hateful, threatening, pornographic, or that contains nudity, or graphic or gratuitous violence; or do anything unlawful, misleading, malicious, or discriminatory.
*If you receive posts on your channels that meet the above, contact your chapter liaison and the Alumni Association's online community manager for help.
- Absolutely no discussion of athletic recruitment. This is a direct violation of NCAA regulations.

General Social Media Tips

Regular updates and interaction with other users is crucial to the success of your social media. Don't let your page die! The following are some helpful hints to make sure that does not happen:

- Main Alumni Association channels are a great place to look to for information to share. Try to include a call to action to your post (ask for questions, pictures, etc.) to increase engagement.
- Consistency is more important than frequency. A recommended goal for a chapter social channel is to post at least one to two times per week. It is, however, more important to set up a routine that works for you and to be consistent.
- Post information that others in your group and beyond will like, comment on and share so that you gain a higher priority in people's personal timelines. Remember the three tenants of Forever Buffs – connect, contribute and celebrate – as you are thinking of ideas.
- Experiment with timing to get a feel for your group's own rhythm. You will hit a different audience when you post at different times of the day. The online community manager can help you with recommendations.
- If you are posting about an event, give enough notice so people can plan accordingly. One or two reminders are good, but don't overwhelm your social channels with reminders.
- Before posting make sure to ask yourself if your post would be valuable to you.

- ALWAYS re-read your post to check for grammar and spelling mistakes.
- When possible, when providing links, chose ones that link back to CU webpages.
- Use keywords in your posts: Forever Buffs, CU Boulder, CU Buffs. There are other schools that use CU (Cornell, Columbia, Clemson, etc.) so remember that, especially for Twitter if you are in an area close to these schools. If you include Buffs, Boulder, etc., that will differentiate you from other schools, as opposed to competing with other “CU” institutions.
- Official hashtags are:
 - Alumni Association: #ForeverBuffs
 - Athletics: #GoBuffs
 - Main Campus: #CUBoulder

The Online Community Manager

All forms of social media will be set up for you by the online community manager at the Alumni Association. They will then add you as an editor, rather than an administrator, to ensure consistency with other chapters and that all messages adhere to our branding standards. This allows us to partner, but the bulk of the posting on the page will be the responsibility of the chapter.

After the social channel is up and running, the online community manager will serve as a support resource. Please share any technical or content questions, concerns or ideas with them. They will leverage overall Alumni Association social media and other communication channels to bring awareness to local channels as much as possible.

In most cases, the online community manager will contact the group channel editor before posting. If there is no response from the chapter editor and the information is urgent or the social channel has not had much current activity, the online community manager will post directly. This, however, is not the goal, and the individual chapter editor should be the consistent “face” of the channel.

Forms

All recognized chapters are required to complete and submit the following forms, when applicable. All forms can be found on our Chapter Resources webpage at:

<http://www.colorado.edu/alumni/connect/chapters-clubs/chapter-resources>

Chapter/Club Website Update

Use this form to submit updates, photos and events for to your Alumni Association hosted webpage.

Chapter/Club Email Request

Use this form to schedule an email send. All requests must be submitted at least 7 days prior to the requested send date.

Chapter/Club Emergency Email Update Form

This form is for last minute cancelations or unforeseen changes to event details. This form cannot be used if a Chapter Email Request form has not been previously submitted before the 7-day submission timeframe.

Chapter/Club Event Tracking

Use this form to submit attendance data for your chapter events.

Memorandum of Understanding: Jan. 1, 2017 - Jun. 30, 2018

To be eligible for official recognition and receive support and services from the Alumni Association, all chapters must submit a signed copy of this memorandum of understanding, along with the materials listed below, to the Alumni Association.

RETURN COMPLETED FORM TO: Rebecca Reifel, Senior Chapters Manager, at rebecca.reifel@colorado.edu or print, complete and mail to 1202 University Ave – 459 UCB, Boulder, CO 80309-0459.

TO SUBMIT ELECTRONICALLY: Visit <Link>

Forever Buffs _____ Chapter

The Forever Buffs chapter named above hereby applies for official recognition by the University of Colorado Boulder Alumni Association. As a chapter representative, on behalf of the above named chapter, I agree to carry out the Alumni Association mission in the following ways:

1. Be aligned with the Alumni Association purpose, vision and mission.
2. Engage in proper use of official CU Boulder and Alumni Association branding in all communication.
3. Provide programming for diverse interests and age groups.
4. Use Alumni Association resources for communication with CU Boulder alumni who live in our chapter's geographic area, and encourage alumni to keep their data current by updating their information on the Alumni Association website.
3. Understand that, as a separate entity from the University of Colorado Boulder, our chapter holds full legal and taxable liability for finances, events or functions.
5. Send all scholarship funds in a timely manner to the CU Foundation.
6. Attach the following documents with this Memorandum of Understanding:
 - a. List of chapter officers for the current year, including full name, leadership position, email, phone and address contact information
 - b. Chapter bylaws (if applicable)

As an official leader of this chapter, I agree to the following:

- ☐ I have read the Chapter Manual in full, and I agree to follow the rules and regulations described within.
- ☐ I agree to carry out the Alumni Association mission in the ways outlined above.

Printed name, chapter leader

Signature

Forever Buffs _____ Chapter

Date

FOR ALUMNI ASSOCIATION USE ONLY

Recognition approved by staff liaison

Name: _____

Title: _____

Date: _____