



Alumni Association

UNIVERSITY OF COLORADO BOULDER

Volunteer Leader Handbook and Memorandum of Understanding

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

All chapter and club 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.

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.

What is a Club?

CU Boulder Alumni Association's Clubs program offers unique opportunities for alumni of shared identities and common bonds to connect on meaningful level. Clubs prioritize bettering their overall communities (not just on campus) by fostering connections and they exist to make a significant positive impact on those that they serve. Clubs serve their constituents (students and alums) by providing mentorship services, scholarship opportunities, professional development and other support.



Alumni Association Purpose, Vision, and Mission

Purpose

Our purpose is to inspire all current and future CU-Boulder alumni to develop a lifelong relationship with the university and one another.

Vision

We cultivate pride in the university to increase the perceived value of a CU Boulder degree and build an engaged Forever Buffs community.

Mission

We provide meaningful opportunities through the CU network to help you advance your career, connect to others and enrich your life.

Membership Dues

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

Benefits

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

Marketing Benefits

1. Access to send emails through the Alumni Association and university database.
2. Access to post to CU Boulder branded social media accounts specific to your organization's audience.
3. Oversight of content on a branded 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 "group name"@colorado.edu forwarding email address.
8. Approval from the university to be a sanctioned affiliate organization.

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, graduations, and other events, with items ordered exclusively for alumni organizations.
3. A Forever Buffs branded CU flag.
4. Access to post on the university event calendar for events.
5. Eligibility to apply for the Forever Buffs Volunteer Organization of the Year Award through the Alumni Association.

Volunteer Leader Benefits

1. All volunteer leaders are invited to attend Leadership Weekend, hosted every spring in Boulder, which provides exclusive training and networking opportunities.
2. Volunteer leaders are invited to university events that may take place in your respective city, hosted by all the schools and colleges, to attend as representatives. You may be asked to speak as part of the program to encourage alumni to participate in your organization's activities.
3. Access to webinar and social media trainings for volunteer 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.

Organization Expectations

Volunteer 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. You are required to be:

- The main contact between the Alumni Association and the chapter and needs to maintain regular contact with the staff liaison.
- 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 (if applicable) including holding elections as specified.
- A positive representative in your market for the University of Colorado.
- Responsible to understand and uphold the university's branding and reputation management policies.
- Always adhering to the policies and procedures of the University of Colorado and ask for clarification if you do not understand them.
- A community builder without promoting self-interest or personal gain.
- Respectful of all other volunteers, staff, community members, and constituents.

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.

For more information on the University of Colorado's Code of Conduct, please visit: <https://www.cu.edu/regents/principles/responsible-conduct>.



Chapter 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).

Club Population Requirements

To initiate an alumni club, we recommend that there be at least 4 alumni who have demonstrated an interest in establishing and maintaining the group. In addition, each group should have **minimum of 200 emailable** alumni constituents that the club can communicate to.

Succession

Volunteer leaders should engage continually in succession planning.

- We recommend that leaders transition to new roles every 2-4 years.
- Perpetually recruiting new additions to your organization is key to succession.
- Avoid burnout by surrounding yourself with people and resources.
- Empower others in your network to have an opportunity to lead.
- Consider the future of your organization if you had to suddenly depart.

Recruitment

We recommend that you remember to:

- Dedicate specific resources to recruiting new members.
- Include a recruitment component to all of your events.
- Create an environment that fosters and supports equity and inclusion.
- Be innovative and try a variety of tactics to appeal to different interests.

Governing Document

For groups that have elected to have a governing document, the following is recommended to be included.

- Mission, Vision, Goals
- Leadership structure including term limits and formal positions
- Succession plans
- Membership expectations (attendance, etc.)

Programming Opportunities & Resources

We encourage our volunteer organizations to be innovative in their programming and staff will support programming as appropriate. For specific examples of programming please see [Appendix A: Chapter and Club Event Examples](#).

Alumni Association Support

The Alumni Association is able to provide a variety of support options including, but not limited to: funding, staffing, and marketing resources. If you need support in additional ways please reach out to your liaison, we are here to make you be successful.

Event Planning

When you are creating a new event, or continuing an ongoing event series please remember the following:

- Your liaison is an event planning expert, and there to help you.
- Check for potential conflicts with your event date.
- Submit event details to the Alumni Association as far in advance as possible (the earlier the better).
- The Advancement Marketing and Communications Team is responsible for
 - Updating the website.
 - Creating a calendar listing for your event.
 - Sending out emails promoting your event.
 - Monitoring and supporting your social media presence.
- You are responsible for:
 - Providing detailed, accurate content in a timely manner.
 - Requesting all website updates.
 - Requesting email sends.
 - Submitting accurate attendance data after event completion.
 - Please refer to [Appendix B: Chapter/Club Resources](#) to make requests.
- Please refer to [Appendix C: Marketing Timeline](#) to ensure that you are able to take advantage of these resources. **If you do not meet the required deadlines then your events will NOT be marketed or promoted through Alumni Association channels.**
- Alumni Association may be available to support signature events. Work with your liaison to determine if your event warrants additional staffing support.

Funding

Beginning July 1, 2019, Grant Funding will be provided on a case by case basis with earlier requests given priority. This funding is intended to build your organizational capacity and recruit new members. Your proposal will be reviewed by a committee to determine if it is the best allocation of the limited funds that are available. Feedback will be provided and may revise the amount, or nature of your request. Please keep in mind:

- Volunteer Organizations should apply using the Grant Request Form (see [Appendix B: Chapter/Club Resources](#))
- Volunteer Organizations will receive written approvals via email when grant requests are approved
- Individuals will not be reimbursed for purchases that have not been approved
- Grant funding is not based on market size, and you are not limited to a single grant disbursement or dollar amount.
- No single organization is entitled to a specific dollar amount (no longer “use it or lose it”).
- 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.

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.



Finances

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.



Income and Reimbursements

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

- The university can issue a check, make a payment or provide reimbursement directly to an individual, but not to a chapter bank account.
 - All reimbursements must be approved before you make a purchase.
- Once the Alumni Association collects income on behalf of a chapter, that money must either:
 - Stay within a university account.
 - Be used to pay an approved vendor for goods and/or services provided.
- Money collected through the Alumni Association **cannot** be sent back to the chapter to be used as general operating funds.
- Money collected through the Alumni Association **cannot** be transferred over to a chapter's scholarship account within the CU Foundation.

There are strict regulations surrounding how the Alumni Association can distribute funds. Please contact your Alumni Association liaison for guidance and additional information about income collection.

Nonprofit Status

Volunteer group leaders have the option to incorporate their group as registered nonprofit. Laws, regulations and processes vary from state-to-state. Please contact your liaison for appropriate guidance on this process.



Memorandum of Understanding: July 1, 2019 - Jun. 30, 2020

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: John Wetenkamp, Chapters Coordinator, at john.wetenkamp@colorado.edu or print, complete and mail to 1202 University Ave – 459 UCB, Boulder, CO 80309-0459.

Forever Buffs _____ Chapter/Club

The Forever Buffs chapter/club named above hereby applies for official recognition by the University of Colorado Boulder Alumni Association. As a chapter/club representative, on behalf of the above named chapter/club, 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. Strive to make programming inclusive and accessible to a variety of audiences.
4. Understand that your volunteer organization 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. Collect and submit accurate data for all events.

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

- I have read the Volunteer Leader Handbook 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/club leader

Signature _____
Forever Buffs _____ Chapter/Club
Date _____

FOR ALUMNI ASSOCIATION USE ONLY

Recognition approved by staff liaison

Name: _____

Title: _____

Date: _____