

## Introductory Letter

Alumni Chapter Leadership and Committee Participants,

On behalf of the Methodist University Alumni Association, thank you for your service to your alma mater and to your alumni chapter. Alumni chapters are formed primarily because alumni have a fondness for Methodist University. Alumni also enjoy getting to know other alumni within their community and sharing their experiences and the great Methodist University tradition.

Official alumni chapter affiliation with the Alumni Association comes with many advantages and privileges. This small handbook will help you to better understand our expectations and guide you through the process of starting and maintaining a successful alumni chapter. Again, we thank you for your commitment and look forward to working with you.

Sincerely,

The Office of Alumni Relations

## MU, the Alumni Association, and Alumni Chapters

### About Us

The Office of Alumni Relations works with more than 14,000 graduates across the country and the world, helping them stay connected to MU, their classmates, and mentors. The Alumni Association aims to help promote the general welfare of Methodist University and to encourage and stimulate the interest of graduates and former students in the University; to strengthen relationships among students, parents, faculty, and community; to build spirit and support for the University through communications and events; to provide advice and counsel to the administration and the Board of Trustees; and to assist educational excellence throughout the University.

The Methodist University Alumni Association chapter network is essential to building strong, cohesive communities of alumni across a wide geographic area and a broad spectrum of affinities and special interests.

Methodist University Alumni Office  
Stout Hall  
5400 Ramsey St  
Fayetteville, NC 28311-1420  
910.630.7200  
[alumnioffice@methodist.edu](mailto:alumnioffice@methodist.edu)

Chapters are important to MU because they:

- Promote MU within their local community;
- Provide an ongoing connection between alumni and the university through a diverse offering of programs and events;
- Communicate with key audiences on behalf of the university and alumni association, including students, parents, alumni, and friends of the university; and
- Provide alumni with opportunities to serve as ambassadors and key volunteer leaders on behalf of the university and Alumni Association.

This handbook offers practical information for partnering with the Alumni Association as you work to grow and lead your chapter. Throughout this guidebook, you will learn about useful information to help start or manage a chapter, as well as ideas for achieving success.

All active chapters should be officially registered with the Alumni Association each fiscal year. New chapters may apply at any time and will be approved quarterly in conjunction with the board meeting schedule. When the Alumni Association approves your application, you will need to meet the responsibilities laid out in this guidebook in order to maintain your active status.

While this handbook strives to answer many of your questions, please know that the Alumni Office and alumni association leadership are available to provide support and guidance along the way.

## Alumni Chapter Overview

Alumni chapter development is essential to helping the Office of Alumni Relations build and maintain relationships with alumni and friends of Methodist University. These chapters provide alumni with opportunities for professional and social interaction and for volunteering that benefit both the University and the individual. Through alumni chapters, graduates from Methodist can maintain and develop friendships and associations with other alumni, participate in the ongoing progress and life of the University, and continue to nurture the important education-for-life experience.

There are three types of alumni chapters:

- Geographic Chapters are for alumni and friends of Methodist University in a specific region (Cumberland County, Charlotte Area, New England, etc.).
- Affinity Chapters bring together alumni and friends with a shared common attribute or activity (Black alumni, athletic alumni, law alumni, etc.).
- Academic Chapters are comprised of alumni and friends who graduated from a specific academic discipline (music, biology, history, etc.).

Alumni chapters benefit the school, the alumni, and members of the greater Methodist University community by:

- Creating ways for alumni to network and meet each other in their communities.
- Planning and hosting events that strengthen alumni ties to the University.
- Renewing friendships developed at the University.
- Supporting the efforts of the University to keep alumni informed of campus developments.
- Providing avenues for the exchange of ideas between alumni and the University.
- Assisting the University's recruitment and admissions program.
- Involving alumni in career development, and job and internship placement of students and graduates.

## Alumni Chapter Development

Alumni are spread throughout the United States and around the world. In some cases, the Office of Alumni Relations may identify groups of alumni in certain areas that would benefit from an organized alumni chapter. In other situations, alumni may approach the Office of Alumni Relations to create a chapter.

These steps are necessary to formalize your alumni chapter.

1. Before you start a chapter, check out the list of alumni chapters and groups to be sure there is no chapter already serving your area.
2. Contact the Alumni Office to learn more about the development process and other potential interested parties.
3. Next, a chapter interest form must be submitted to the Office of Alumni Relations for review.
4. Submit a data request form to the Alumni Office. The Alumni Office will publish an appeal to alumni in that defined region or affinity to recruit participants. Diversity in this core group ensures participation in the event from a broader alumni body.
5. Once an interest group has been established, determine the chapter leadership committee.
6. Under the leadership of the chapter president, the chapter leadership committee should set chapter goals.
7. A chapter registration form must be submitted within two weeks of a quarterly meeting to be reviewed by the Alumni Association's Nominations Committee (Board Membership and Chapter Relations).
8. Upon approval by the Director of Alumni Engagement and Philanthropy and the Nominations Committee, the Alumni Association will make a formal vote at the next quarterly meeting.
9. Once registered officially by the Alumni Association, the chapter can meet regularly and work towards goals set in the chapter registration form.
10. To maintain the status of a chapter, all guidelines within this handbook must be addressed and followed, or the chapter may be dissolved by the Alumni Association.

## Alumni Chapter Maintenance

In order to maintain good standing as an active chapter of the Methodist University Alumni Association, all recognized chapters must adhere to the following:

- **Leadership:** The group must report leadership changes to the Director of Alumni Engagement and Philanthropy.
- **Events:** Each chapter shall hold a minimum of one signature event per year. Prior to scheduling any event, the president should contact the Office of Alumni Relations to coordinate the proposed date with other alumni activities on the alumni calendar. All events shall be held in a manner consistent with the overall goals and objectives of Methodist University and the Alumni Association.
- **Annual Review and Renewal:** Regardless of the original recognition date, all chapters will come up for review by the executive committee of the Alumni Association at the beginning of the fiscal year (July 1). The Alumni Office will share a survey each May for chapter participants to complete. The results will be shared with chapter leadership by June 1 each year to assist in the annual review and renewal process. Should a chapter be unable to adhere to the chapter maintenance requirements, the executive committee may take steps to initiate the chapter suspension/dissolution process.
- **Legal Relationships:** Alumni chapters are recognized entities of the Methodist University Alumni Association. The Alumni Association operates under the auspices of Methodist University and is subject to the authority thereof.
- **Contracts and Agreements:** Any contract(s) must be entered under the authorization of the Director of Alumni Engagement and Philanthropy of Methodist University. Questions concerning these matters should be directed to the Director of Alumni Engagement and Philanthropy.
- **Product Licensing/Methodist University Logos:** All use of the Methodist University seal and logos must be approved by the Director of Alumni Engagement and Philanthropy.
- **Chapter Payment Criteria:** Monies spent by a chapter for an event or meeting must be approved by the Director of Alumni Engagement and Philanthropy in advance, prior to expenditure.

## Chapter Leadership, Structure, and Organization

Alumni chapters rely on volunteers. To be successful, there needs to be a foundation of volunteer leaders that the alumni chapter can depend upon to stay engaged. Active volunteers keep the alumni chapter running efficiently and ensure responsibilities are appropriately delegated among the leadership team.

### Chapter Leadership Expectations and Responsibilities:

1. Read, acknowledge, and agree to this handbook.
2. Sign the volunteer agreement.
3. Participate in various planning committees that carry out the programming provided by the chapter, including the annual strategic planning meeting.
4. Assist the chapter president with the identification and recruitment of additional participants.
5. Provide educational, social, and/or service-oriented event ideas to the chapter president.
6. Attend and/or volunteer at as many chapter events as possible, especially the annual signature event.
7. Educate alumni and friends within the chapter about events and encourage attendance.
8. Use personal communication tools such as social media, email, and phone to contact other alumni and friends about chapter initiatives and events.
9. Support the efforts of the university to keep alumni informed on campus developments.
10. Serve as an ambassador of Methodist University.
11. Make a yearly financial contribution to the university.
12. Be engaged with your chapter leadership.
13. Where possible, maintain a social media presence on platforms such as Twitter, Facebook, and/or Instagram.
14. Take pictures during events and submit them to the Alumni Office through the chapter president.
15. Keep track of attendance at events. Share the names and contact information of attendees.
16. Keep all alumni contact information gathered confidential and used for alumni purposes only.
17. Announcements or other communications made for personal, commercial, or political gain are strictly prohibited on University or chapter-affiliated platforms.
18. Adhere to alumni chapter policies.
19. Comply with policies and requests from the Office of Alumni Relations.

### Executive Leadership Team Position Descriptions

#### **Chapter President**

The Chapter President serves as the face and voice of the chapter within the alumni community and leads the Executive Leadership Team by empowering volunteers and fostering engagement.

Individuals in this role should possess strong leadership and interpersonal skills, demonstrate enthusiasm for Methodist University, and maintain knowledge of the University's mission, history, accomplishments, and priorities.

#### **Responsibilities**

- Work with the Methodist University Alumni Association to ensure training and resources are available for chapter leadership.
- Communicate regularly with the Membership Lead, Engagement Lead, Fund Lead, Director of Alumni Engagement and Philanthropy, and MUAA Executive Board.
- Lead chapter planning, strategic goal setting, and leadership development.
- Mentor and support Executive Leadership Team members.
- Recruit and maintain a complete Executive Leadership Team.
- Coordinate and lead chapter meetings and leadership workshops.
- Partner with leadership to review fundraising goals, expenses, and progress regularly.
- Ensure all chapter initiatives align with the mission and policies of Methodist University.
- Serve as the primary liaison between the chapter and the Office of Alumni Relations.
- Submit chapter reports and updates as requested.

### **Membership Lead**

The Membership Lead serves as the chapter's recruitment, engagement, and retention expert.

This role focuses on bringing alumni together while building meaningful relationships that strengthen chapter participation.

#### **Responsibilities**

- Assist the Chapter President in recruiting Executive Leadership Team members.
- Mentor and support Chapter Ambassadors.
- Develop strategies to recruit and retain alumni participants.
- Encourage participation in chapter events and volunteer opportunities.
- Communicate regularly with Chapter Ambassadors.
- Build relationships with alumni, organizations, and community leaders.
- Assist with membership outreach and engagement campaigns.
- Collaborate with the Fund Lead and Chapter President regarding fundraising participation goals.
- Monitor recruitment benchmarks and engagement progress.
- Create and distribute annual membership engagement surveys.

### **Chapter Ambassadors**

Chapter Ambassadors serve as outward-facing champions for the chapter within their communities.

This role is adaptable depending on the chapter type and geographic region.

#### **Responsibilities**

- Recruit alumni to participate in the chapter.
- Build relationships with alumni year-round.
- Serve as a primary point of contact for assigned alumni.
- Conduct regular outreach and engagement check-ins.
- Educate alumni about Methodist University's mission, accomplishments, and initiatives.
- Support fundraising efforts in partnership with the Fund Lead.
- Encourage alumni participation in events and volunteer opportunities.
- Provide mentorship, encouragement, and recognition to alumni participants.
- Communicate alumni feedback and needs to the Membership Lead.

- Participate in chapter meetings and planning initiatives.

### **Engagement Lead**

The Engagement Lead develops the chapter experience and serves as the hospitality expert of the Executive Leadership Team.

This role focuses on creating meaningful and engaging alumni experiences that strengthen participation and chapter culture.

#### **Responsibilities**

- Assist the Chapter President in recruiting Executive Leadership Team members.
- Mentor the Communications Lead, Events Lead, and Recognition Lead.
- Support the planning and implementation of chapter events and experiences.
- Assist with development strategies to increase chapter engagement.
- Coordinate engagement initiatives that create welcoming and inclusive environments.
- Meet regularly with the Chapter President to review engagement goals and progress.
- Support chapter retention initiatives through programming and volunteer appreciation.

### **Communications Lead**

The Communications Lead serves as the chapter's online voice and connector.

This role manages chapter communication strategies and promotes engagement through various communication channels.

#### **Responsibilities**

- Maintain chapter meeting minutes and records.
- Update and maintain chapter online platforms and social media accounts.
- Communicate chapter updates and event information to members.
- Coordinate with the Fund Lead to promote fundraising activities.
- Assist with chapter newsletters, emails, and promotional campaigns.
- Provide updates and information for inclusion in MUAA communications.
- Respond to online inquiries and communication needs.
- Coordinate marketing materials and chapter promotional resources.
- Work with the Recognition Lead to celebrate chapter members and volunteers.

### **Events Lead**

The Events Lead coordinates the planning and execution of chapter programs and events.

This role works closely with the Engagement Lead and Office of Alumni Relations to create successful chapter experiences.

#### **Responsibilities**

- Assist with chapter event planning and logistics.
- Coordinate event volunteers and operational support.
- Work with the Director of Alumni Engagement and Philanthropy regarding event approvals and timelines.



- Support the execution of signature chapter events.
- Coordinate venue logistics, registration, and event communication.
- Assist with post-event evaluations and attendance reporting.
- Help ensure chapter events align with University policies and standards.

### **Recognition Lead (As Needed)**

The Recognition Lead ensures volunteers, sponsors, alumni, and participants feel valued and appreciated.

This role focuses on volunteer stewardship and recognition strategies.

#### **Responsibilities**

- Develop creative recognition initiatives for volunteers and alumni.
- Coordinate volunteer appreciation efforts.
- Assist with recognition materials and acknowledgments.
- Support chapter morale and volunteer retention.
- Partner with chapter leadership to recognize member achievements and contributions.
- Meet regularly with the Engagement Lead to discuss recognition strategies.

### **Fund Lead**

The Fund Lead drives chapter fundraising and philanthropic initiatives that support the mission of Methodist University.

This role helps educate alumni and the community about Methodist University's priorities and opportunities for support.

#### **Responsibilities**

- Assist with recruiting Executive Leadership Team members.
- Mentor and support the Accounting Lead.
- Develop fundraising and philanthropic engagement strategies.
- Work with chapter leadership to establish fundraising goals.
- Collaborate with the Events Lead on fundraising initiatives and events.
- Promote chapter scholarship opportunities and giving initiatives.
- Coordinate fundraising communication with the Communications Lead.
- Meet regularly with the Chapter President to review fundraising progress.

### **Accounting Lead**

The Accounting Lead maintains accurate financial records for chapter fundraising and financial activities.

This role ensures compliance with Methodist University financial procedures and policies.

#### **Responsibilities**

- Collect and process cash and checks from chapter events.
- Coordinate donation processing with the Office of Advancement Services.
- Maintain accurate financial records and documentation.

- Assist with event revenue tracking and reporting.
- Work closely with the Chapter President and Fund Lead to ensure compliance.
- Support chapter budgeting and financial planning.
- Meet regularly with the Fund Lead regarding financial benchmarks and reporting.

### Leadership Transitions

A person can serve as a chapter officer for up to three consecutive one-year terms. If members of the chapter leadership are not fulfilling their roles and responsibilities or any additional duties as assigned, it is recommended that the chapter president and Alumni Office staff be notified.

Any chapter leadership changes must be completed by June 30 to submit with the Annual Chapter Renewal form prior to the Alumni Association July Board Meeting. Examples of chapter leadership structures, roles, and responsibilities may be adapted to suit the chapter's needs.

## Events

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

Each chapter is encouraged to host multiple events and required to have at least one signature event per year. The Office of Alumni Relations staff will assist in planning and implementing approved and scheduled events. If a chapter chooses to host an event during Homecoming, the Alumni Office will market the event within the Homecoming materials.

### Event Registration and Attendance

A registration process and/or a sign-in sheet is required for your event. This allows the Chapter and the Alumni Association to track attendance and engagement and to measure success. It also creates an opportunity for post-event follow-up and outreach. Please submit all registration and/or sign-in sheets to Alumni Association staff at the conclusion of all events. All chapter event online registration must be managed through the Alumni Office's preferred vendor and University account.

### Event Categories and Ideas

- Alumni Connect: An event that allows alumni to connect and engage in a social setting.
- Academic Interest: An event that fulfills MU's mission to create lifelong learners.
- Professional Development and Networking: These kinds of events help alumni make business connections and grow professionally.
- Student-Focused: An event during which local alumni support or connect with MU students.
- Service: An event that invites alumni and friends to serve and engage with the community.
- Philanthropy: An event that has a fundraising component to support a chapter's scholarship or other MU fundraising initiative.

## Chapter Event Planning Timeline

Successful alumni engagement events require substantial planning time, strategic communication, volunteer coordination, and collaboration with the Office of Alumni Relations and University partners.

To ensure high-quality experiences and stronger alumni participation, chapters are encouraged to begin planning major events a minimum of 12–16 weeks in advance.

### **Annual Planning (Recommended) By June 30 Each Year**

- Conduct an annual strategic planning meeting.
- Establish chapter goals and signature event priorities.
- Develop a tentative chapter event calendar for the upcoming fiscal year.
- Identify fundraising opportunities and partnership possibilities.
- Submit annual event projections with the Chapter Renewal Form.

### **16 Weeks Before the Event Visioning and Strategic Planning**

- Determine the overall purpose and goals of the event.
- Identify target audiences and expected attendance.
- Establish measurable outcomes and engagement objectives.
- Brainstorm sponsorship, fundraising, or philanthropic opportunities.
- Determine whether the event will include:
  - University leadership
  - Guest speakers
  - Sponsors
  - Student participation
  - Alumni panels
  - Vendors or entertainment
- Begin identifying volunteers and leadership assignments.

### **14 Weeks Before the Event Date and Venue Coordination**

- Contact the Office of Alumni Relations to review proposed event dates.
- Research and secure tentative venue options.
- Discuss budget projections and anticipated expenses.
- Begin conversations with vendors and potential partners.
- Identify whether contracts, catering, or University approvals will be required.
- Submit preliminary event concept information to the Alumni Office.

### **12 Weeks Before the Event Event Approval and Logistics Launch**

- Submit the official Chapter Event Proposal Form.
- Finalize venue selection.

- Confirm keynote speakers, special guests, or entertainment.
- Develop sponsorship strategy and outreach plan if applicable.
- Begin creating event timeline and run-of-show.
- Confirm volunteer leadership roles.
- Coordinate with the Communications Lead regarding promotional needs.
- Determine whether Marketing & Communications support is needed.

#### 10 Weeks Before the Event

##### Marketing and Promotion Preparation

- Finalize event branding and theme.
- Begin development of:
  - Invitations
  - Flyers
  - Social media graphics
  - Registration pages
  - Email campaigns
- Launch sponsorship outreach if applicable.
- Coordinate alumni outreach strategy with Chapter Ambassadors.
- Submit graphic design requests to Marketing & Communications.
- Confirm photography or audiovisual needs.

#### 8 Weeks Before the Event

##### Public Launch and Registration

- Launch official event registration.
- Begin formal event promotion through:
  - Social media
  - Email marketing
  - Personal outreach
  - Chapter ambassadors
  - Alumni newsletters
- Confirm catering estimates and venue requirements.
- Recruit additional volunteers as needed.
- Begin regular planning meetings with chapter leadership.

#### 6 Weeks Before the Event

##### Engagement and Outreach Push

- Continue promotional efforts and alumni outreach.
- Monitor registration numbers and engagement metrics.
- Confirm sponsor participation.
- Begin preparing event materials:
  - Signage
  - Programs
  - Nametags
  - Recognition items
  - Giveaways
- Coordinate volunteer assignments and event responsibilities.

#### 4 Weeks Before the Event Operational Finalization

- Review budget and financial obligations.
- Submit Special Purpose Fund Request Forms.
- Finalize food and beverage counts.
- Confirm speaker logistics and travel if applicable.
- Finalize event agenda and program flow.
- Coordinate final promotional push.
- Conduct leadership planning check-in.

#### 2 Weeks Before the Event Final Preparation

- Confirm attendance numbers.
- Send reminder communications to registrants.
- Finalize volunteer schedules.
- Confirm all vendor logistics.
- Prepare registration lists and check-in materials.
- Review contingency plans for weather or venue issues.
- Finalize photography and social media coverage plans.

#### 1 Week Before the Event Event Readiness

- Conduct final planning meeting.
- Confirm all event details with vendors and venue.
- Review setup timeline and volunteer assignments.
- Prepare all materials and supplies.
- Confirm transportation and parking information.
- Ensure all financial procedures are understood.

#### Day of Event Event Execution

- Arrive early for setup and walkthrough.
- Ensure volunteer coordination and hospitality readiness.
- Monitor registration and attendance.
- Capture photos and engagement metrics.
- Recognize sponsors, volunteers, and alumni participants.
- Encourage future engagement and chapter participation.

#### Within 1 Week After the Event Follow-Up and Stewardship

- Send thank-you communications to attendees, sponsors, and volunteers.
- Post event photos and highlights on social media.

- Submit attendance lists and event photos to the Alumni Office.
- Submit all receipts and financial documentation.
- Conduct internal leadership debrief and evaluation.

#### Within 2 Weeks After the Event Evaluation and Reporting

- Submit Chapter Event Evaluation Form.
- Review event outcomes and engagement metrics.
- Document recommendations and lessons learned.
- Discuss future engagement opportunities with attendees.
- Identify prospective future volunteers and chapter leaders.

#### Recommended Event Planning Standards

To improve chapter event success, chapters are encouraged to:

- Plan signature events at least 3–4 months in advance.
- Coordinate closely with the Office of Alumni Relations throughout the planning process.
- Utilize Chapter Ambassadors for personal outreach and alumni engagement.
- Incorporate stewardship and recognition into all events.
- Use multiple communication methods to increase participation.
- Maintain consistent planning meetings and deadlines.
- Build annual event calendars early to avoid scheduling conflicts.
- Include succession planning by involving newer volunteers in event leadership.

#### Finances

As a rule, however, chapter events should be planned to break even or be profitable through sponsorships and/or admission fees.

#### Chapter Special Purpose Accounts

1. On behalf of the Chapter, the Alumni Office will establish a Methodist University special purpose account for each Chapter. All chapter related financial transactions (expenditures, checks, revenues, donations, scholarships, etc.) must flow through the on-campus Methodist University special purpose account to be considered a charitable gift.
2. Chapters may not hold any off-campus bank accounts, checking accounts, or other financial services.
3. Chapter financial reports can be requested by each Chapter President at any time with 5 working days' notice.

#### Credit Card and Cash Management

1. If a Methodist University Advancement staff member is present at a chapter event, the Office of Alumni Relations can provide a change box and/or credit card terminal to facilitate the collection of admission fees or donations in the form of cash, check or credit card transactions at chapter events and programs.
2. All cash and checks received must be returned or postmarked (certified mail) to the Office of Alumni Relations within the next business day following an event.

3. The Methodist University online credit card system accepts Visa, MasterCard, Discover, American Express, and Apple Pay. The use of other payment platforms (ie. Cash App, Venmo, Zelle, etc.) are not permitted.

#### Chapter Revenue and Contributions

1. All philanthropic donations and gifts received by a chapter shall be deposited and receipted by Methodist University within the next business day.
2. Chapters may approach individuals or corporate partners for sponsorship or financial support of chapter initiative provided the list has been cleared first through the Office of Alumni Relations to insure coordination with other current or potential university solicitations and/or proposals.
3. Chapters may submit a Fundraising Request form to request permission to raise revenue to support chapter events, initiatives, and scholarships. These revenues are generally raised via ticket sales, program fees and philanthropic gifts and solicitations. All revenue received by a chapter shall be deposited and receipted by Methodist University within the next business day.
4. Any written solicitation letters, proposals or communications at any dollar amount must be reviewed by the Office of Alumni Relations prior to distribution.
5. Checks should be made payable to Methodist University with a notation in the memo designating the specific chapter or intended purpose.
6. Contributions to chapters can also be made online at [donate.methodist.edu](https://donate.methodist.edu). Donors should be instructed to use "Other" and add the Chapter name. Chapters can request a specific donation form to their area, if necessary.
7. Chapters may receive gifts-in-kind of goods or services with approval from the Office of Alumni Relations.
8. Upon receipt of the contribution, the Chapter must also collect the name and address of the donor so that Methodist University can provide the donor with their official receipt of donation for tax purposes.
9. Fundraisers not permitted:
  - a. Fundraising for any candidate for political office
  - b. Door-to-door fundraising on Methodist University campus
  - c. Sale or distribution of items that violate the University Identity Standards Manual
  - d. Solicitation of faculty, staff, students, and the community without prior permission
  - e. Membership dues
  - f. Raffles

#### How to Spend Chapter Funds

1. Chapters may direct the use of chapter funds for purposes deemed appropriate by each chapter leadership committee, in congruence with the chapter mission and with guidance from the Office of Alumni Relations.
2. All chapter expenditures and financial transactions must follow Methodist University financial policies, hospitality policy, and signing authorities.
3. Original and itemized receipts must be submitted when requesting payment for expenses within 5 days of the event.
4. Gratuity for services and tips cannot exceed 20% on any transaction.
5. A check or payment in the name of the company/individual must be disbursed directly from Methodist University to the service provider as additional tax information is generally needed. Chapter members cannot submit receipts and request reimbursement.



6. Chapters cannot use Chapter funds in the following ways:
  - a. Gifts/flowers for faculty/staff/alumni/students for congratulatory purposes or who are retiring, ill and/or passed away cannot be purchased with chapter funds.
  - b. Gift Cards cannot be purchased/reimbursed using Chapter or University Funds.
  - c. Payment or reimbursement for gasoline/mileage for event participants.
7. To utilize chapter funds, a Special Purpose Funds Request form must be submitted 10 days in advance. Once approved by the Office of Alumni Relations, the Alumni Office will coordinate disbursement to the vendor after items received and/or event completed.
8. All agreements must be reviewed and approved by the Office of Alumni Relations.

#### Endowed Scholarships

Chapters are encouraged to use funds raised through event fees, program income, or philanthropic donations to provide endowed scholarships to Methodist University students. Chapters interested in setting up an endowed scholarship should contact the Office of Alumni Relations to initiate a scholarship. Endowed scholarship agreement templates and worksheets are available to assist chapters. Each chapter can request a scholarship name and selection criteria. All scholarship criteria and guidelines shall follow Methodist University policies.

The current policy sets endowed scholarships at a minimum of \$25,000 or \$5,000 over five years. Once the \$25,000 minimum is met, it will be invested by Methodist University. Scholarships will be awarded from the earnings generated by the endowment. Endowment funds shall be invested and managed in accordance with the Methodist University Investment Policy which is set and overseen by the Investment Committee of the Board of Trustees. The Investment Policy, as of April 28, 2018, states that endowment accounts pay out, on an annual basis, the amount of four and one-half percent (4.5%) of the average market value of the preceding twelve (12) quarters, determined as of December 31st. This payout amount may be changed from time to time by the Investment Committee. Additional contributions may be made to this fund by all interested individuals or organizations in perpetuity.

All chapter scholarships shall be disbursed to students and administered through the Methodist University Office of Financial Aid. Chapter scholarships can only be awarded to current/returning Methodist University students. Students who are graduating and do not plan on returning in an academic capacity in the term the funds are received, are not eligible to receive a scholarship.

#### Funds when Chapter is Suspended or Dissolved

When a chapter is suspended all funds deposited in the special purpose account will remain in the account. A suspended chapter cannot request funds from the account.

Once a chapter is dissolved and there has been no financial activity, including deposits or disbursements during the last two years, the special purpose account will be inactivated. Any remaining funds in the chapter's special purpose account will be transferred to the chapter's endowed scholarship(s), if applicable. If the chapter did not initiate an endowed scholarship during its existence, funds will be transferred to the Alumni Association.

## Communications

All materials bearing the university's name and/or logo must be approved by the Director of Alumni Engagement and Philanthropy. An Identity Standards Manual will be provided to the chapter leadership committee.

### Chapter Web Pages

All chapters are to receive a webpage linked from the Alumni Association. This webpage features chapter leader contact information, chapter information, recent and upcoming events, links to social media pages and more. To have information on your page updated, contact the Alumni Office.

### Invites

Chapter leaders may request a physical and/or virtual invitation to be created for any chapter event. This process is initiated through the Event Request Form. The Alumni Office will work with chapter leadership to confirm invitation lists and a communication timeline. If the event is approved at least eight weeks in advance, the Alumni Office can print and mail invitations at their expense for the chapter signature event. All other physical invitations must be paid for out of the chapter's special purpose account.

### Social Media Accounts

Chapters are permitted to have an account on social media platforms they prefer. An Advancement staff member must have administrative access to all chapter social media accounts. For additional tips on using social media, see the Social Media Best Practices Below.

#### Best Practices

- Assess the goals of your channel before creating or sharing a post.
- Follow the Methodist University Identity Standards Manual when you create content.
- Create a content calendar to help maintain a steady posting schedule throughout the semester and engage alumni in your area.
- Share content from other MU accounts.
- Encourage volunteers in your chapter to like, follow, and share your chapter's social post to amplify the content.
- Evaluate content before you share or promote it.
- MU does not condone violence of any kind.
- Posts should not use derogatory language that demeans MU or other institutions.
- Individual chapters should avoid fundraising for outside non-profit organizations.

### Chapter Logos and Merchandising

All chapters will receive an official Methodist University logo that can be used on social media, chapter emails, chapter web pages, etc.

The University's Identity Standards Manual applies to all designed artwork for chapter merchandise. No alterations of the university marks or logos are allowed. Prior to production, artwork (including the usage of MU likeness, branding, and logos) must be sent to the Alumni Office for approval.

Chapters may print T-shirts, hats, or other branded items for individual purchase by chapter members. The Alumni Office will assist in production of chapter artwork designs. When evaluating vendors, the Alumni Office should be copied on all communication.

## Chapter Suspension and Dissolution

The Office of Alumni Relations, Alumni Association, and its executive committee are committed to assisting all recognized Chapters to be viable and successful. Unfortunately, when chapters are unable to meet the minimum maintenance requirements, they may face suspension or dissolution. The following describes the circumstances and procedures that apply when this situation becomes necessary.

- **Suspension and Dissolution by the Chapter:** A chapter may be suspended if there is no longer an interest or ability by the leadership or its participants to maintain the chapter. The executive committee of the Alumni Association will acknowledge the suspension when it receives notification from the chapter president of such situation, or a renewal form has not been submitted by the June 30 deadline. The executive committee shall then promptly inform the Alumni Association of the chapter's suspension status.

If after two years from the date of suspension the chapter has not been reactivated, then the chapter may be dissolved by majority vote of the Alumni Association or executive committee.

- **Suspension/Dissolution Process:** The executive committee may suspend a chapter if it fails to meet the maintenance requirements as previously outlined. When suspension or dissolution becomes necessary, the following due process will be followed:
  - A written notification of suspension will be sent to the chapter president by the president of the Alumni Association. This notification shall include a request to participate in a meeting between the executive committee and chapter leadership to discuss the status and/or possible alternatives for the continued viability of the chapter. If an in-person meeting is not possible, then an alternative communication method should be worked out between the executive committee and the chapter leadership.
  - Depending on the outcome of this meeting, the executive committee will make a recommendation regarding the chapter's ongoing status (continuance, suspension, or dissolution) to the Alumni Association.
  - If, after two years from the date of suspension, the chapter is not reactivated, then the chapter may be dissolved by the majority vote of the Alumni Association or executive committee.