Dear Chapter Leader,

Thank you for volunteering your time to help further the mission of the Penn State Alumni Association and show your pride in Penn State. We know that your time is valuable, and we appreciate all that you do to connect Penn Staters in your community.

The following guide was created in an effort to give our chapter leaders—both the new and the more experienced—a reference guide to help navigate through chapter operations. It is meant to be used in conjunction with the Volunteer Toolkit found on the Alumni Association’s website (alumni.psu.edu) under the “Alumni Groups/Resources” section.

The entire Alumni Association staff is always available to help and guide you. The Volunteer Services team has primary responsibility for supporting our chapters, and each chapter has a regional director assigned to work primarily with the volunteer leaders. You can reach us through email at alumni-relations@psu.edu or by phone at 800-548-5466, option 3.

We look forward to working with you!

The Volunteer Services Team
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The Penn State Alumni Association is the largest dues-paying alumni organization in the world. It is recognized as a leader in innovative programs, outreach to alumni, and philanthropy. The Alumni Association is guided by a strategic plan, which outlines our mission and objectives.

**Mission**

To connect alumni to the University and to each other, to provide valued services to members, and to support the University’s mission of teaching, research, and service.

**Strategic Goals 2013-15**

- **Goal 1:** Accelerate membership growth
- **Goal 2:** Manage crisis impacts in concert with our mission
- **Goal 3:** Strengthen revenue streams
- **Goal 4:** Clarify the Alumni Association’s relationship with the University
- **Goal 5:** Enhance diversity at the Alumni Association and the larger University
- **Goal 6:** Strengthen alumni engagement
- **Goal 7:** Sustain and strengthen relationships with other key constituencies/stakeholders

To learn more about the Alumni Association’s strategic plan, you may view the entire document on our web page at alumni.psu.edu/about_us/overview.

**Statement on Diversity**

The Division of Development and Alumni Relations at Penn State defines the concept of diversity as one that encompasses acceptance and respect. It means recognizing and understanding individual differences. These differences can include race, ethnicity, national origin, gender, sexual orientation, socio-economic status, age, life circumstances, physical abilities, religious beliefs, political beliefs, or other ideologies. Diversity is the exploration of these differences in a safe, positive, and nurturing environment. It is about understanding each other and moving beyond simple tolerance to embracing and celebrating the rich dimensions of diversity contained within each individual.

We encourage all of our chapters to work to ensure that the composition of your chapter and your board of directors, in particular, accurately reflects the diversity of your constituents. You should take into consideration all aspects of diversity noted above and strive to create an atmosphere of inclusiveness. For more information on recruiting and diversifying your board, please refer to the Chapter Structure section of this guide.

It is also important to take accessibility issues into account when selecting locations for events. Visit http://accessibility.psu.edu/ to learn more.
Membership in the Penn State Alumni Association

The Alumni Association is a nearly self-sustaining dues-paying membership organization. Most support and services that our groups receive is a direct result of our dues structure.

Expectations
Members of the Penn State Alumni Association pay dues separately from local chapter dues. In order to remain a chapter in good standing with the Alumni Association and receive benefits, all members of your board of directors must also be members of the Alumni Association. Being a general member of a local chapter does not require that a person also join the Alumni Association, though we do encourage you to promote membership in the Alumni Association right alongside membership in your local chapter. Chapters directly assist the Alumni Association’s membership by helping market Alumni Association memberships to their resident alumni. To see a full list of benefits, visit the member center on our website at alumni.psu.edu/membership.

Real Life Program
Each group will receive $50 for every new life member recruited during the fiscal year, which runs July 1—June 30. Each group has been assigned a unique three-digit code, which can be found in the Volunteer Toolkit on our website (alumni.psu.edu/groups/volunteer). Ensure your group’s code is printed on all life membership applications, as we cannot add the code once the application has been submitted.

Alumni can also use your group’s code if they complete the online application via our website. Once they select the “Life Member” option, they will be asked if an affiliate group recruited them. After they select the group type, they will then be given a drop-down menu where they can look for the name of your chapter. You should remind potential life members to choose your chapter from the list.

At the end of the fiscal year on June 30, the Alumni Association will tally the number of life members recruited by each group. In August, payment will be made to each group based on its number of recruits.

Organizational Context
Within the University, the Alumni Association is a part of the Division of Development and Alumni Relations. In addition to reporting to the Alumni Association’s executive board, the organization’s executive director reports to the senior vice president of the division, who reports directly to the University president.

Alumni Association Structure
The Alumni Association is divided into 11 teams. Each team is listed below along with a brief description.

Executive Administration
The executive administration unit assists the executive director with managing Alumni Association day-to-day operations. Other responsibilities include handling Alumni Association human resources
activity and overseeing the receptionist staff, who act as front-line customer service representatives at the Hintz Family Alumni Center.

**Alumni Association Development**
The focus of this unit is on raising major gifts, particularly for endowments to support and sustain Alumni Association programs and services, as well as support alumni affiliate groups (chapters, alumni interest groups, etc.) in fundraising, especially for their scholarship endowments.

**Business and Finance**
This unit manages the Alumni Association's finances, investment portfolio, and overall budget. It also oversees selected revenue-generating products/services and secures and fosters partnerships with sponsoring corporations and businesses to develop benefits such as credit card/financial services programs, alumni insurance programs, and similar efforts.

**Donor and Member Services**
The Office of Donor and Member Services manages biographical, membership, and donor information for alumni and friends (parents, corporations, foundations, etc.) of Penn State. Our office records, receipts, and acknowledges Alumni Association members and Penn State’s donors in a timely and accurate manner. The office handles the updating of alumni and friends records on the Division of Development and Alumni Relations (DDAR) database—the official database of record for alumni and friend data. It also handles the recording of major pledges, the sending of pledge reminders, the processing of credit card gifts and memberships, as well as gift matching forms. Additionally, the office works with all of the colleges, campuses, and administrative units in helping them process gifts for their respective areas.

**Grassroots Network**
The Penn State Grassroots Network—the Alumni Association's legislative education and advocacy arm—works closely with Penn State's Office of Governmental Affairs, the University administration, and other University offices to shape strategies, messages, and tactics that help the 36,000 Grassroots Network volunteer members (alumni, students, parents, and friends) advocate for Penn State among community leaders, policy makers, legislators, and government officials about issues important to Penn State.

**Information Systems**
This unit maintains the Alumni Association's technology infrastructure and provides computer support and training to Alumni Association staff.

**Membership**
The membership team oversees a comprehensive membership program to engage current and future alumni, parents, and friends of Penn State. The team also handles database and trend analysis, benefit reviews, market research, and performance insights to support Alumni Association membership goals.

**Program Development & Enrichment**
This unit—organized into the four programmatic areas of Alumni Events, Alumni Travel and Education, Alumni Career Services, and Student Involvement (which includes the Lion Ambassadors
and the Blue & White Society)—develops and implements programs, events, and services that connect alumni and students to the Alumni Association and the University. The team promotes social, cultural, and intellectual engagement through new programs as well as maintains traditional offerings aimed at responding to the needs and interests of a diverse alumni constituency.

**Strategic Communications**
This team focuses on strengthening the Alumni Association's reach and image by producing and delivering innovative, high-quality, consistent communications, both online and in print. The team is also charged with creating, raising, and sustaining awareness about the Alumni Association's programs, services, and initiatives. Specific responsibilities include planning, writing/designing, and executing two of the organization's key member-benefit publications—the AlumnInsider e-newsletter and The Football Letter. The group also develops and implements electronic communications strategies including the website and email marketing, and manages the Alumni Association's Facebook, Twitter, LinkedIn (with Alumni Career Services staff), and other social media platforms.

The Penn Stater *Magazine*
Published six times a year as a member benefit, The Penn Stater magazine is Penn State's most visible publication. It seeks to keep alumni informed about, connected to, and involved with their alma mater. In addition to the print publication, magazine staff also produce an online blog and maintain a Facebook site.

**Volunteer Services (Primary Point of Contact For All Affiliate Groups)**
This unit provides assistance and guidance to all the alumni affiliate groups, including chapters, affiliate program groups (APGs), alumni interest groups (AIGs), college and campus constituent societies, Alumni Council, and the Executive Board. Staff train alumni volunteers, organize and present leadership conferences, support directors of alumni relations employed at various University campuses and colleges, and generally serve as the primary liaison with all alumni volunteers.

**Alumni Council**
The governing body of the Alumni Association is responsible for its management, control, and development in carrying out the mission of the Alumni Association as set forth in its Statement of Mission, assisting in the advancement of the mission of the University, and increasing the interest and cooperation of alumni in programs designed to be of service to the University. Members of Alumni Council include both elected and appointed members. Elected members are voted upon each year by the general Alumni Association membership. The president of each alumni society representing every college and campus are also given a seat on Alumni Council. Council members serve on committees and task forces, and elect the vice president of the Alumni Association who then assumes the presidency.

**Alumni Affiliate Groups**
There are four types of alumni affiliate groups within the Penn State Alumni Association. Chapters, alumni interest groups, and societies all receive their charters through Alumni Council. Affiliate program groups are chartered by their corresponding college/campus alumni society.
Chapter—a group of alumni in a particular geographic region. Chapters have their own dues structure.

Alumni interest group (AIG)—a group of alumni with a common interest (including ethnic, student organizations, religious, etc.)

Society—a group of alumni who attended a particular campus or graduated from a particular college. Membership in a society is automatic with membership in the PSAA.

Affiliate program group (APG)—a group of alumni connected to a specific major or academic program (e.g., Dairymen, Nursing, etc.).

Contacting the Alumni Association

The main phone number of the Alumni Association is 800-548-LION (5466) or (814) 865-6516. When contacting the Alumni Association, the best starting place is with your regional director. If you are unsure who your regional director is, contact the Volunteer Services team using the 800-number noted above and choosing option 3. A complete listing of all staff is available on our website.
ASSOCIATION SUPPORT

Within the Alumni Association, many resources are available to help you in your leadership role within the chapter.

**Volunteer Services Team**

The entire Volunteer Services team is committed to facilitating partnerships with affiliate groups that empower them to develop and support diverse opportunities for alumni and friends. The team includes a director, associate director (who also serves as a regional director), two regional directors, and three administrative support assistants.

Regional directors are the Alumni Association’s ambassadors, and as such, stand ready to consult with you on training opportunities, communication, feedback about operations, membership, and other issues you may encounter during your tenure.

The most important contact you have is with your regional director, whose job it is to offer you and your board advice and direction.

**Financial Support**

Each chapter is responsible for establishing its own operating budget and dues structure according to the size of its membership, area in which members live, and annual activity plan. While the Alumni Association does not fully fund our chapters, we do provide various sources of funding.

**Communication Allocations**

Funds are set aside each year to assist affiliate groups in communicating with their memberships. The amount for each chapter is based upon the number of Alumni Association members, postage rates and an allotment for printing costs. The Alumni Association does not automatically mail the checks, they must be requested. This helps to ensure that the funds are being used for intended purpose and that the allocations are sent to the correct person. A finished product (either a newsletter or a website) should be shared with your regional director after receiving your allocation. To request your allocation, please complete the online request form found in the Volunteer Toolkit.

**Speaker Grants**

Your chapter may choose to bring in a featured speaker for an event. Your chapter is responsible for covering all travel expenses and any honorarium requested by the speaker; however, in an effort to help offset these costs, the Alumni Association offers a $500 speaker grant once per fiscal year. *(Please note: if a speaker from the Alumni Association staff is chosen, the grant is reduced to $250 due to the fact that we cover our staff’s travel expenses.)* To apply, complete the online application form found in the Volunteer Toolkit.

If you would like ideas for possible speakers, contact your regional director for a list of suggestions. The list is intended to be a starting point, not all-inclusive. Don’t forget to ask the members in your chapter for ideas as well. Many groups have found some terrific speakers on their own.
**Awards Program**
Groups chosen as recipients of our Affiliate Group Awards receive a $500 stipend as a result of their recognition. For more information on the Awards Program, see the Awards section of this guide.

**Homecoming Parade Competition**
Each year, the Alumni Association sponsors a competition during the Homecoming Parade. Four winners are selected based upon spirit and enthusiasm displayed during the parade—two from Pennsylvania and two from out of state. First-place winners each receive $500, and second-place winners each receive $250.

**Promotion and Marketing**
The following benefits and services provided by the Alumni Association will help your chapter with promotion and marketing.

**Membership/Contact Cards**
As an Alumni Association affiliate group, you are entitled to carry membership cards. The Alumni Association communications team will design and print the cards for you. Groups of Distinction may receive up to 500 cards at no cost as an award benefit; however, any group may purchase cards. Please contact your regional director for prices and/or to place an order. For more information on the Group of Distinction program, please see the Awards section of this guide.

As an alternative to membership cards, many groups choose to have contact cards printed. These cards are used by leaders and members at events and around town to share chapter contact information with alumni and friends. The Alumni Association can also design these cards for you. We currently have two standard templates. Groups of Distinction may choose to use their benefit of 500 cards for contact cards in lieu of membership cards.

For examples of the templates used by the Alumni Association for both membership cards and contact cards, contact your regional director.

**Giveaways**
We will provide your chapter with various items imprinted with the Penn State Alumni Association logo up to three times per year for specific functions. You may request a packet for your student sendoff event, one football game per season, and either an annual dinner or golf tournament each year. Packets typically include name tags as well.

The Alumni Association also offers chapters access to an annual bulk purchasing opportunity for giveaways and specialty visibility items that includes offerings such as Penn State shakers, signage, decals, magnets, balloons, pins, ball caps, etc. Ask your regional director for details.

**Chapter Banners**
The Alumni Association provides each affiliate group with one banner with the group’s official mark. A banner is automatically ordered and mailed directly to the president upon the charter approval of the group. If this banner is lost or stolen, the group is responsible for replacing it. Questions regarding ordering banners should be directed to your regional director.
**Chapter Mark/Logo**
Your official chapter mark/logo is the same one that is found on your banner. It has the Penn State shield on it with the Alumni Association name below the line and your chapter name above the line. This is the official chapter mark that should be used on all print and online communications to represent your group. If you need a copy of your mark for documents, letterhead, T-shirts, web pages, etc., contact your regional director to obtain a copy. There are two different versions of each group’s mark—one that is used on a light background color, and one that is used on a dark colored background. A good rule of thumb in order to remember which one is which is that once printed, the lion should always be a lighter color than the shield (i.e., white lion on a blue or black shield).

The Alumni Association has created a “Graphic Standards and Visibility Guidelines” document for affiliate groups that outlines mark/logo usage as well as other visual identity details.

**Event Listing on the Penn State Alumni Association Website**
You may list your chapter’s officially sponsored activities on the association’s website by completing the form on the Events page. The link to the form can be found under the heading “Alumni Group Events” or by clicking here.

**Communication**
Communication with your membership is a key ingredient to having a successful chapter, which is why we devote an entire section later in this guide to this topic. The following are specific ways in which we support the communication needs of your chapter.

**Communication Allocation**
Funds are set aside each year to assist affiliate groups with communicating with their membership. See the Financial Support section for details.

**Address Data and Mailing Labels**
A key benefit of being a chartered organization within the Alumni Association is access to the alumni addresses in our database. You may request data for the alumni in your area at any time by contacting your regional director. We recommend that you request fresh data often, and specifically any time you are ready to send out a mass mailing (hard copy or electronic). This data is also referred to as “selects” since we are selecting a specific group of alumni from the database. Data can be pulled based on various criteria. You should talk to your regional director about how the data will be used to determine the best criteria to use.

The most common way that data is selected—and the default unless otherwise specified—includes current Alumni Association members and alumni who have allowed their memberships in the Alumni Association to lapse in the last five years. This will give you recent graduates as they are given a free year of membership upon graduation. These criteria are also used to determine your annual communication allocation.
Other common types of lists that are pulled include change of address, new or recent graduates, and all area alumni. If you have a special list that you want to request, discuss your plans with your regional director, and they will help determine the best way to request the data.

**Important note:** All information obtained through the alumni database is confidential and is intended for chapter business use only. Misuse of data can result in loss of access to the database.

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**Email Addresses**
In addition to mailing addresses, you may also ask for available email addresses. Email addresses are intended for single use only since they tend to change more often than mailing addresses. You should not use email lists that are more than two weeks old. One exception is if you are using the data to update a listserv. If you are creating or updating a listserv, it is important to include an “opt out” option and honor requests to be removed. Please be specific in your “opt out” message to indicate that it will exclude the person from chapter mailings only.

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**Website Tools and Hosting**
Space is available to our groups for hosting your chapter’s website through the Alumni Association. We offer templates to help you create and maintain your web presence. For more information about options and access, contact your regional director. Chapter contact information, including name and email address of your volunteer web coordinator, will be required.

There are also various web-hosting services beyond those offered by the Alumni Association. Many of our groups use these other services, which range in price from free to expensive. Your regional director can offer you ideas if you are interested.

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**Electronic Surveys**
To best serve the alumni in your area, it is important to know as much as possible about their interests. To assist you with this goal, we offer the ability to conduct an electronic survey once every two years. Questions can focus on anything from membership benefits to ideas for events. Your board is responsible for creating the survey questions and submitting them to your regional director. A link to the results of the survey will be sent to the chapter contact person once the survey has been distributed and results tabulated.

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**Football Ticket Lottery**
The Alumni Association makes football tickets available to its active* groups through a lottery drawing held each year. We regret that we are unable to guarantee that groups will get the tickets they request. We appreciate your understanding of this situation. Please contact your regional director if you have any questions or concerns.

*For more information on how to achieve active status, see the section “Maintaining Active Status” section of this guide.*
Basic Guidelines
All alumni organizations chartered by the Alumni Association that are in good standing will have the opportunity to qualify for a chance drawing for tickets, typically held in June of each year. Instructions and the link to the request form will be sent to group presidents electronically prior to the drawing. All request forms must be received by the Alumni Association by 5:00 p.m. on the date indicated in the notification.

Procedures
1. Complete the request form with the number of tickets that you wish to have and your first choice of game. Please also indicate a second and third game choice. Keep in mind that selecting another game does not affect your chances of receiving your first choice; it simply increases your chances for tickets should tickets for your first choice game be unavailable. (There will be a maximum number of tickets that can be requested per game, which will be determined prior to the mailing.)

2. Submit the ticket request form by the deadline indicated in the instructions.

3. Groups will be drawn until all tickets have been allocated.

4. Groups will be notified by their regional director of the results following the drawing.

5. Those groups whose names were drawn will also receive notice via email and regular mail, including an invoice to pay for the tickets. All payments must be made by the deadline indicated on the invoice to the Alumni Association office. Checks should be made payable to “Penn State.” The association will acknowledge receipt of your check. If payment by the deadline poses a problem for your group, there is an option for deferral that will be included with the invoice. Follow the instructions provided with the invoice to request one.

No tickets can be returned to the Alumni Association or to the Penn State Ticket Office. Request only the number of tickets you can use/sell.

The Alumni Association has no control over where the seats are located. Tickets will be mailed from the Ticket Office approximately two weeks prior to the game.

Training Opportunities
We do not expect volunteers to know everything they need to know from the very beginning. That is why we offer various training opportunities, including this Chapter Leaders Resource Guide, to our group leaders and potential leaders.

Alumni Leadership Connections Conference
Once every three years, the Alumni Association hosts a large leadership conference at University Park. open to all of our affiliate group leaders, potential leaders, and alumni relations staff of all the colleges and campuses. It’s a chance to network with other leaders from across the country and attend workshops on current and hot topics.

Alumni Leadership Connections Regional Trainings
In the years between Alumni Leadership Conferences at University Park, the Volunteer Services team takes the training “on the road.” Three different destinations are selected each year in various parts of the country and a one-day opportunity to connect with other alumni leaders is offered where groups can network, share ideas, and participate in topic specific discussions.
Personal Visits
The Volunteer Services team spends a great deal of their time each year visiting our affiliate groups around the country. If your chapter has a specific need or issue with which you would like help, contact your regional director. Some issues may be able to be addressed via phone or email. If an in-person visit is the best solution, we will work together with you to schedule a visit.

Webinars
The Volunteer Services team has created a series of webinars that are broadcast during the lunch hour (ET). All you need to participate is an email address, the link for the webinar, and a computer with high-speed Internet. Each participant has the opportunity to ask questions of the presenter through an on-screen chat window. Topics vary, and each webinar is recorded so that if you cannot participate in the original you have the option of watching it later. For more information on the series, or to suggest a topic, contact your regional director.

Business and Operations
It is important to remember to address the business and operations aspect of your chapter. The Volunteer Services team will send out emails on specific topics as necessary (e.g., tax filing reminders). In addition, you may find the following information useful.

EIN Tax ID Number
The Alumni Association encourages all of its affiliate groups to apply for an individual EIN, or tax identification number. The online application is the preferred method for customers to apply for and obtain an EIN. Once the application is completed, the information is validated during the online session, and an EIN is issued immediately. The online application process is available for all entities whose principal business, office or agency, or legal residence (in the case of an individual), is located in the United States or U.S. territories. The principal officer, general partner, grantor, owner, trustor, etc., must have a valid taxpayer identification number (Social Security number, EIN, or individual taxpayer identification number) in order to use the online application. Visit irs.gov for more information. (You will need to complete Form SS4.)

Once you have your EIN number, please share it with your regional director. This ensures that the group is included in our report to the IRS as a recognized group within the Alumni Association, and that the group is covered under our insurance policy.

Filing Taxes
All groups are required to file taxes annually with the IRS. The form that is used depends on the amount of the chapter’s gross receipts.

If your organization’s gross receipts were more than $25,000 for the year, you will be required to file either Form 990 or Form 990-EZ, Return of Organization Exempt from Income Tax.

With the enactment of the Pension Protection Act of 2006, small tax-exempt organizations whose gross receipts were $25,000 or less will be required to file an annual electronic notice, Form 990-N, Electronic Notice (e-Postcard) for Tax-Exempt Organizations not Required To File Form 990 or 990-EZ.
The e-Postcard is due by the 15th day of the first month after the close of the tax period. Since the Alumni Association’s tax period ends on June 30, the e-Postcard is due on November 15.

You can access Form 990N by going to the following website and follow the three-step process: [epostcard.form990.org](http://epostcard.form990.org).

The e-Postcard will require you to provide the following information:

- Organization’s legal name
- Any other names that the organization uses
- Organization’s mailing address
- Organization’s website address (if it has one)
- Organization’s employer identification number (EIN)
- Name and address of a principal officer of your organization
- Organization’s annual tax period (June 30)
- A statement that your organization’s annual gross receipts are still normally $25,000 or less
- If applicable, indicate if your organization is terminating (going out of business)

The Pension Protection Act requires the IRS to revoke the tax-exempt status of any organization that fails to meet their annual filing requirement for three consecutive years. Therefore, organizations that do not file the e-Postcard or an information return, Form 990 or 990-EZ, for three consecutive years will have their tax-exempt status revoked.

If you have additional questions, a member of the Business and Finance Office of the Alumni Association would also be happy to try and answer any questions that you might have about electronic filing. Contact your regional director, and he/she will connect you with the appropriate person.

**Tax-exempt Status**

Penn State and its affiliate groups are tax-exempt entities. This means that our groups are not required to pay income tax. This does not exempt your group from sales tax. In order for your group to be included, the Alumni Association must have a copy of your EIN number on file. If you need information about or documentation of this status, please contact your regional director.

**Insurance Coverage**

Penn State alumni chapters, societies, affiliate program groups, and alumni interest groups (“alumni groups”) are all insured under a Commercial General Liability, Non-owned Automobile Liability*, and Umbrella Liability insurance program with Travelers Insurance Company. This insurance program is separate from the University’s insurance programs. Insurance coverage is provided for the normal operations and activities of the alumni groups. Group members, officers, and volunteers are additional insureds with respect to their activities on behalf of their respective alumni groups. No insurance coverage is provided for activities outside of the scope of alumni chapter activities. The insurance policies provide insurance to cover bodily injury and property damage liability as a result of alumni group activities, subject to normal insurance policy exclusions.

*Note regarding non-owned automobile liability insurance coverage: This is not primary Automobile Liability insurance suitable for driving motor vehicles of ANY TYPE, including rented vehicles, nor does it provide automobile insurance protection for members of alumni groups. This is excess automobile liability coverage in the name of the alumni...
groups (as legal entities), in the event that the alumni group is named in an automobile claim arising from a covered member who was using his/her automobile on behalf of the alumni group. This insurance does not extend to the driver, operator, or owner of the automobile, nor does it provide insurance coverage suitable for operating a motor vehicle.

**Host liquor liability** insurance coverage is provided when the alumni group is acting as a social host. This means that insurance coverage is provided for the alumni group when an alumni group hosts an event where alcohol is served, as long as the alumni group does not sell, manufacture or distribute alcohol. This is insurance coverage for the alumni group, not for the bartender or the facility owner; they need their own liquor liability insurance coverage, and they must comply with applicable laws.

**Proof of Insurance/Insurance Certificates**
Insurance Certificates (which provide proof of insurance coverage) can be provided when required by an entity or organization that an alumni group is doing business with (such as a restaurant, municipal park, or other facility—known as the “certificate holder”). Insurance certificates are not issued to the alumni group itself for informational purposes or for their files to be used multiple times, since each insurance certificate is customized for the specific requirements and date(s) needed by the “certificate holder.”

To request an insurance certificate, please follow these steps:

1. Complete the online “insurance certificate request form.” The form will automatically be forwarded to the Volunteer Services Team who will work with the University’s risk management office to obtain the insurance certificate. A link to this form can also be found in the Volunteer Toolkit.

2. Risk Management will review the insurance requirements and any other contractual requirements to make sure that the requirements can be complied with. Risk Management will advise if there are any suggested contractual changes or “deal-breaker” provisions in the contract/agreement, but ultimately it is the alumni group’s decision as to how to proceed.

3. Risk Management will obtain the insurance certificate from the insurance carrier, review it, and forward it via email to the Alumni Association regional director and the alumni group’s contact person. The alumni group will forward the insurance certificate to the “certificate holder” (usually with the signed contract or agreement), since the alumni group maintains the contractual documents.

*Please allow at least two weeks for turnaround time, for the Alumni Association to review the contractual requirements (and provide feedback to the alumni group if necessary); request, obtain, and review the insurance certificate; and email the insurance certificate to the alumni group.*

**NCAA Regulations Compliance**
One of the important cornerstones of the Penn State Intercollegiate Athletics program is the loyalty and enthusiasm of Nittany Lion fans who have demonstrated by their interest in our teams, and their attendance at events, that they are without equal.
Intercollegiate Athletics appreciates this marvelous fan support, which stimulates and encourages our student-athletes and energizes our entire organization.

We must be cautious, however, not to let enthusiasm for athletics lead us into conflict with the very specific rules and regulations of the National Collegiate Athletic Association or the Big Ten Conference.

The NCAA definition of "a representative of the University's athletics interests" is very broad and encompasses many if not all of the people who are regular attendees at our sports events. If you fall into this category, there are a number of activities regarding contact with student-athletes and athletic recruits that could put the University at risk for NCAA sanctions.

Athletics has summarized the applicable NCAA Compliance Brochure is available online in the Volunteer Toolkit. Please take the time to read it carefully. If you have any questions, call the Intercollegiate Athletics compliance office at (814) 863-8048.

The University is charged with the responsibility to exercise "institutional control" of its athletic interests, and Penn State is committed to maintaining the kind of responsible program in which all of us take such great pride.

Penn State is grateful for all you have done to make this one of the model programs in the nation. We know, based on our contacts with alumni, faculty and friends across the Commonwealth and the country, that you share our earnest ambition for athletic success within the rules.

The most important thing to remember is, when in doubt, please ask.
CHAPTER EXPECTATIONS AND REQUIREMENTS

Alumni maintain ties to Penn State and with each other through the Alumni Association's many affiliate groups. The Penn State Alumni Association sponsors nearly 300 chartered groups that provide opportunities for professional development, networking, volunteering, and friendship building. The Alumni Association affiliate group network is the largest in the world.

Chapters directly assist the Alumni Association in advancing its mission and growing its membership by helping to promote Alumni Association events, services, and memberships to their alumni.

Maintaining Active Status

All of the following actions are required to maintain active status with the Alumni Association and continue to receive benefits and services. If your chapter is having difficulty meeting these requirements, you should ask for help from your regional director.

Basic Programmatic Requirements

Each chapter must do all three of the following to be considered an active group in good standing:

1. Communicate with members—This includes newsletters, an up-to-date web page, and emails. If you do not communicate with your membership, you cannot expect for them to join, participate in activities, or volunteer.

2. Promote Chapter Membership—In order to attract new members and retain current members, the chapter must devote concerted efforts to membership.

3. Membership in the Penn State Alumni Association—The Alumni Association is a membership-driven organization and as such all of the support that our chapters receive is a direct result of the association’s dues structure. This requirement applies to the members of your chapter who serve on the chapter’s board of directors. We also encourage you to promote membership in the Alumni Association to your membership at large.

Annual Report

A chapter annual report is necessary for the Alumni Association to complete its annual report to Alumni Council. Information on the annual report, including the due date and a link to the online form, is sent to all group presidents near the end of the fiscal year (June 30). The annual report covers all activity for the fiscal year (July 1–June 30) that is coming to a close.

Board of Directors and Officers List

It is critical that the Alumni Association be able to maintain accurate and up-to-date board listings for each affiliate group. Therefore, you must send this information (including names, addresses, graduation years, email addresses, and position) to the Volunteer Services team as soon as possible after a change is made, as well as attaching it to the annual report. It is also helpful to include the names of those people who have left your board so that we can update their information as well.
Bylaws
An integral part of the process to receive a charter from the Alumni Association as a new affiliate group is the development of a set of bylaws. We highly recommend that you review your bylaws periodically to ensure they remain relevant to your chapter. The date the bylaws were last reviewed should be printed on your bylaws. Any changes to the bylaws need to be approved by the general membership of the chapter. A copy of the chapter bylaws should be sent to your regional director whenever changes are made.

Recommendations for Creating and Maintaining a Strong Chapter
The following items are not required but they are strongly encouraged.

Developing Annual Goals
Your chapter should develop working goals each year. The following is a list of 15 programmatic categories that you should consider when developing your goals. This is the same list that we use when determining Groups of Distinction. (see the Awards and Recognition section of this guide for more information.) We recommend that you establish leadership positions on your board to lead the chapter’s efforts in each of the chapter’s chosen areas. By offering activities in a variety of categories, the chapter provides its members with choices and is able to reflect the diversity of its constituents. When developing goals, the chapter should take into consideration age, major, race, socio-economic status, etc.

1. Alumni Association membership support and recruitment (beyond the Board of Directors)
2. Career networking and professional development (e.g., career networking, panels, special presentations)
3. Social interaction and fellowship (e.g., football-viewing parties, family picnics, a day at the park)
4. Community service (local or national level; THON excluded)
5. Interactive communication (e.g., social media, Twitter, LinkedIn, Facebook)
6. Participation in Alumni Leadership Connections opportunities (e.g., trainings, webinars, one-on-one with the Volunteer Services team)
7. Support/Participation of Alumni Association events and initiatives (e.g., Pep Rallies, City Lights, Research on the Road, Homecoming Parade, Senior Sendoff)
8. Submit a nomination(s) for the Alumni Association’s Volunteer Awards Program (obtaining Group of Distinction status does not qualify for this category)
9. Joint activity (i.e., collaborative effort with another Alumni Association affiliate group)
10. New or innovative program (i.e., try something that you haven’t tried during the past 3 years)
11. Student interaction (e.g., student sendoff, mentoring, care packages)
12. Financial support of students (e.g., book awards, annual scholarships, emergency grants)
13. Annual contribution to group’s endowment through the University
14. Alumni admissions participation
15. Participation in THON-related activities
**Evaluations**
A systematic approach to evaluating your activities and benefits can be very insightful and helpful in the planning of future events. There are many ways to accomplish this goal, including evaluations at individual events and formal surveys of your membership. We encourage you to develop benchmarks with organizations of all types to maintain continuous quality improvement.

**Strategic/Work Plan**
Each chapter is encouraged to develop a strategic plan or a work plan and submit a copy to the Alumni Association. Plans typically cover a period of one to three years. The Alumni Association’s strategic plan can be found on our website and can be used as an example. If you would like help in developing a strategic plan or a work plan, contact your regional director.

**Membership Roster**
To communicate with all of your alumni, it is necessary to have updated and accurate membership information. Lists of alumni in your area (known as selects) can be obtained from the Alumni Association through your regional director. These lists are confidential and should only be used for chapter business—such as membership drives and annual newsletters.

**Meeting Minutes**
Minutes should be kept of all chapter meetings. This keeps an official record of chapter activities and keeps members who were unable to attend a meeting informed. A copy of the minutes should be sent to your regional director as soon after the meeting as possible. For your convenience, you may also use email to forward the minutes.

**Political and University Elections—Non-endorsement Policy**
Alumni Association affiliate groups are not permitted to endorse any specific candidate for any political office, Board of Trustees, or Alumni Council. This is a violation of our nonprofit status.

**Policies for Elections**
The following is the Penn State Alumni Association’s election policy governing how the Alumni Association and its affiliate groups may participate in the Board of Trustees and Alumni Council elections. Please note that these policies cover both traditional print publications as well as electronic media (including email, listservs, social media sites, and websites). It would not be appropriate to use any listservs and/or mailing lists to distribute information concerning an individual’s candidacy.

Alumni Association policy, reaffirmed over the years in periodic evaluations, is to refrain from publicly endorsing, supporting, or campaigning to elect individual candidates in any election, including the University’s Board of Trustees or Alumni Council. Such policy is in keeping with the philosophy of the Alumni Association’s Executive Board and is consistent with the Alumni Association’s status as a 501(c)(3) nonprofit organization. Individual political activity by employees is not prohibited, but it may not be done in the name of the Alumni Association or any of its constituent groups.

Regarding Board of Trustees elections, the Alumni Association does take positive steps to encourage greater alumni participation in the election process. It also makes alumni aware of when the elections occur and of the process to vote.
For the Alumni Council elections, the Alumni Association affords all alumni members of the Alumni Association the opportunity to be nominated for Council and vote in elections. The Alumni Association actively pursues and encourages alumni from diverse backgrounds to seek election. Elections are promoted through various publications (both print and electronic).

Beyond those activities, the Alumni Association does not endorse, contribute to, work for, or otherwise support or oppose any electoral candidates or advocacy groups; rather, its stance has been to encourage broad participation, to treat all candidates with equal respect, and to avoid influencing voters’ choices. Such neutrality is also important for preserving the Alumni Association’s nonprofit status under the Federal Tax Code. This neutrality extends to social media as well; any posts that support or criticize specific candidates or advocacy groups on official Alumni Association social networking sites such as Facebook, LinkedIn, and Twitter are strongly discouraged and are subject to removal by site administrators.

Because affiliate groups—including chapters, college and campus constituent societies, Alumni Interest Groups, and Affiliate Program Groups—are chartered by the general Alumni Association and receive a portion of their budgets and other forms of support from the Association, the Alumni Association’s policy of political neutrality also extends to these groups.

The Alumni Association encourages its affiliate groups to publicize the Trustee and Alumni Council elections, in an effort to raise voter awareness and turnout. The following rules shall be observed:

1. Inform alumni of nomination and election dates and procedures;
2. Introduce all candidates, not just the ones from your constituency;
3. Encourage alumni to participate in the election process;
4. Give equal space and treatment to all candidates so as not to appear to be campaigning as an organization for any one nominee.

Also, please remember that alumni data is NOT permitted to be shared with any group or individual and is only to be used for appropriate affiliate group communications. See section on “Address Data and Mailing Labels” for more details on data use issues.

We encourage you to contact your regional director or alumni relations staff with specific questions.

**Statement for Web Pages or Social Networking Sites**
The following paragraph about our non-endorsement policy is an example of what can be posted on chapter websites and Facebook pages and used when responding to emails:

“While the Alumni Association encourages our alumni to participate in all elections in which they are eligible to vote, Penn State Alumni Association affiliate groups are not permitted to endorse or imply endorsement of specific candidates, groups of candidates, or advocacy groups backing/opposing specific candidates participating in or running for election to the Penn State Board of Trustees, the Alumni Association’s Alumni Council, or any political office. This includes sharing the names of individuals trying to obtain a nomination to be included on a ballot as well as the election itself. This is a long-standing policy that supports our mission of inclusiveness and respect for the diverse viewpoints of all alumni and members. We appreciate your understanding and adherence to this policy.”
Proper Use of Data
Whenever a chapter requests an alumni list from the Alumni Association, we attach a copy of our Guidelines and Data Usage Policy. Please review this policy when you receive data to ensure that you are following the most current guidelines. With that in mind, we wanted to include a few of the highlights in this guide:

1. Group listservs/emails, websites, and social media sites are intended for **affiliate group business only**;
2. Groups **may not** endorse any specific candidates or groups of candidates (this includes advocacy groups with the stated mission of supporting or opposing specific candidates);
3. Groups **may** encourage members to educate themselves and vote without mentioning specific candidates/groups;
4. Groups **may** provide information on how to request a ballot—for the Board of Trustees election, send an email to bot@psu.edu.

We know that you will receive requests from those running in various elections asking you to forward information on to your members, and you **cannot** do this. Instead, encourage your members to do research and to vote in the election.
CHAPTER STRUCTURE

Chapter Formation

Chapters may be formed in any geographical area where a critical mass of alumni resides. The boundaries are established by agreement among the Alumni Association, the organizers of the chapter, and any Penn State chapter already in existence that may be affected. If you know of someone who is interested in starting a new chapter, please refer them to the Volunteer Services team.

General Chapter Goals

All chapters have three basic goals:

1. Connect Penn State alumni, students, parents of students, and friends of the University by providing information, services and programming.
2. Assist the University in promoting its programs under the direction of the Alumni Association.
3. Recruit volunteers for the various programs of the Alumni Association and the University.

Defining the Board of Directors

The board of directors is the governing body for your chapter. The number of members varies by chapter. It is suggested that you have an odd number of directors on your board so that it is impossible to have a tie vote. The composition of your board should include officers, committee chairs and directors-at-large. All directors are required to be paid members of the Alumni Association.

Job Descriptions

When recruiting volunteers for your organization, you must provide them with as much information as possible. This means developing good descriptions for all volunteer positions.

A volunteer job description is an important document. It clarifies the expectations of the volunteer and the organization, and it serves as protection for both parties as it provides a summary of the agreed position.

Volunteer job descriptions need the same level of detail as paid job descriptions and should include enough detail for the volunteer to understand what the job entails, including but not limited to the following:

- the objectives of the position;
- a description of the tasks and responsibilities involved, leaving some room for innovation and creativity;
- desired qualifications;
- estimated amount of time involved;
- an evaluation of the position/measures of success;
benefits of the position.

Officers
Traditionally, officers consist of the president, vice president, treasurer, and secretary. However, you are not limited to these four positions. Officers should be defined in the bylaws. Below are sample job descriptions for these four main positions.

PRESIDENT—The president shall serve as the chapter’s primary point of contact for alumni, students, parents of students, friends of the University, and the Alumni Association. He/she is responsible for leading all aspects of the chapter’s activities.

1. **Objective:** The chapter president keeps the chapter focused on setting and maintaining its goals. The president oversees officers and committees and encourages teamwork. The president maintains the operations of the chapters.

2. **Responsibilities:** Attend all meetings; preside at all meetings; monitor progress of chapters goals and objectives; review/enforce strategic/work plan and bylaws; send updated copy of bylaws to the Alumni Association; review your committee structure and assignments; be sure they are relevant and valuable to the organization; attend Alumni Association training sessions; identify and implement services for chapter members; keep current with Alumni Association services; prepare board meeting agendas; report to membership; serve as the chapter’s spokesperson; recognize achievements of members; prepare the chapter budget along with other officers; and consider the leadership potential of your board members and begin to identify those who might be able to continue effective leadership after your tenure is finished.

3. **Qualifications:** Knowledge of Alumni Association; working knowledge of chapter bylaws; service of at least one term in another officer position; ability to delegate; public speaking ability; leadership skills; and the ability to communicate effectively.

4. **Average time commitment:** Six hours per month.

5. **Measure of success:** New members are recruited and retained; problems are handled in a timely manner; committees are active and growing; available to other officers and committee members; meetings are held efficiently.

6. **Benefits:** Gain experience in building and working with committees; play a key role in shaping chapter’s future; opportunity to network on different levels; improve meeting management skills; gain experience that can be used on the job; and be a mentor to new volunteers.

VICE PRESIDENT—The vice president shall support the president in all aspects of the chapter’s activities. He/she shall act on behalf of the president in his/her absence.

1. **Objective:** The vice president is responsible for assisting the president in coordinating and directing committee activities and chapter operations.

2. **Responsibilities:** To attend all meetings; monitor progress of the chapter’s goals and objectives; enforce bylaws; manage the activities of committees that report directly to the vice president; advise and assist the president; assume the president’s role in the president’s absence; attend Alumni Association training sessions; identify and
implement services for chapter members; keep current with Alumni Association services; report to membership; and prepare the chapter budget along with other officers.

3. **Qualifications**: Knowledge of the Alumni Association; working knowledge of chapter bylaws; service of at least one term in another officer/board position; ability to delegate; public speaking ability; leadership skills; and the ability to communicate effectively.

4. **Average time commitment**: Five hours per month.

5. **Measure of success**: Completion of goals; new members are recruited and retained; problems are handled in a timely manner; committees are active and growing; available to other officers and committee members; meetings are held efficiently; and good team spirit exists.

6. **Benefits**: Gain experience in building and working with committees; play a key role in shaping the chapter’s future; stepping stone to chapter presidency; opportunity to network on different levels; recognition, improve meeting management skills; and gain experience that can be used on the job.

**TREASURER**—The treasurer is responsible for the financial records and operations of the chapter. He/she is responsible to both the elected directors and the general membership of the chapter on all fiscal matters.

1. **Objective**: To develop and monitor the chapter’s financial operations.

2. **Responsibilities**: Maintain financial records and reconcile discrepancies on a monthly basis; deposit all funds received as soon as possible in an account at a federally insured financial institution; provide receipts for all funds collected and disbursed; retain copies of receipts for a period of three years; prepare annual budget with help from other officers; prepare monthly financial statements; monitor cash flow; disbursement of all funds in conjunction with president; and prepare and file IRS and other government forms.

3. **Qualifications**: Working knowledge of chapter bylaws; service of at least one term in another officer position; and good with numbers, comfortable doing accounting, and balancing checkbooks.

4. **Average time commitment**: Eight hours per month.

5. **Measure of success**: Checkbook is balanced; all forms are filed in a timely manner; an independent review of the financial transactions of the organization has been conducted by someone other than the treasurer; and the budget has been submitted, approved and met.

6. **Benefits**: Gain experience in building and working with committees, play a key role in shaping chapter’s future, opportunity to network on different levels, improve meeting management skills, gain experience that can be used on the job.

**SECRETARY**—The secretary is responsible for maintaining a written record of chapter activities. He/she is also responsible for all written correspondence in regards to the business of the
chapter. He/she is responsible for taking and distributing minutes of all meetings. A copy of all minutes should also be sent to the regional director.

1. **Objective:** To maintain chapter’s records.

2. **Responsibilities:** Attend all meetings; record and prepare minutes of board and business meetings; distribute minutes to all board members following approval by the president; maintain chapter records; distribute written correspondence of the chapter as it relates to chapter business; and work with membership chair to coordinate mailings; etc.

3. **Qualifications:** Knowledge of the Alumni Association; working knowledge of chapter bylaws; good record keeping; good note taking; and the ability to delegate.

4. **Average time commitment:** Four hours per month.

5. **Measure of success:** Minutes distributed in a timely manner; records are maintained; and chapter business is in order.

6. **Benefits:** Gain experience in building and working with committees; improve meeting management skills; and gain experience that can be used on the job.

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**Committee Chairs**

Committees develop options for policies and present them to the board for its consideration and approval. Committee chairs are encouraged to be voting members of the board of directors.

The importance of effective committee leadership cannot be over-emphasized. Chairpersons should have a record of experience with and commitment to board service. Prior membership on the committee is not necessarily a prerequisite for the job, but it is helpful. It is also beneficial to identify future committee leadership.

More details on committee structure, responsibilities of the chairperson and recommended committees can be found in the “Committee Structure” section of this handbook.

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**At-large Directors**

Not all members of your board of directors need to have a title or a specific role. At-large directors are voting members of the board who contribute to the chapter in a variety of ways, including assistance with special projects, service on committees, and representation of the general membership.

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**Developing Your Board of Directors**

Do you know the number-one reason why people do not volunteer? Simply put, they are not asked! Remember when putting together your board of directors, you are not asking other people to do this for you personally; rather, you are asking for the glory of Penn State and all of its alumni—both current and future. Not only are you giving people the opportunity to get involved with your affiliate group, but also to connect with the Alumni Association and all Penn Staters across the country.
Seven Steps to Recruiting a Great Board of Directors

Recruiting a strong board of directors that represents the diversity of your potential membership can be a daunting task. The following seven steps will help you develop a successful plan.

1. Work with other key people to determine what positions need to be filled. Together write down each position on a separate sheet of paper. Next, put the kind of characteristics you want this person to have. For example, persistence, goal-oriented, computer skills, public speaking skills, banking/accounting skills, etc.

2. Make a list of possible targets for each position. These may be people you know, people you have seen at an event, people you have heard of, or a complete stranger. Take this list to your existing board members, friends, family, co-workers, etc., and determine if they know anyone on the list and what relationship they have with them.

3. Put together a short list of your favorite candidates from the suggestions offered by the group. Do a little research and find out if they have any history of volunteering for Penn State or any other organization. Find out about accomplishments they may have.

4. Determine with the support of your current board who is the best person to meet with this potential board member. Ask those who assisted in the nomination process if you can use their name when calling to set up the appointment, especially if they have a relationship with the person.

5. Make an appointment with your potential board members. Let them know exactly how much time you would like to have with them and how many people you plan to bring with you. Tell them you want to discuss Penn State in general and your group specifically. Set up a time and location that is convenient for them. This may be a quick lunch, breakfast or an after work meeting.

6. During your meeting, keep the conversation casual. After all, this is a volunteer position! Take the job description and have a list of meeting/events dates and locations and the estimated amount of time it will take to get the job done. It is important to paint a picture of the work involved and all the fun and satisfaction he/she will get being a part of it — be specific. While we never want to pressure anyone into a position, we do have to “sell” the opportunity to get involved.

7. Don’t ask for an answer on the spot, but insist the candidate take some time to think about the position now that he/she has more information about what is involved. It is important, however, to “close the sale” and let them know you will call them in couple of days. If they decline to be on the board on the spot or during your follow up call, ask them for some referrals and add those people to your long list. Don’t forget to send a thank you card.

Special note: Remember, people do not have to be on the board of directors to be involved. A great way to develop a potential board member is to get them involved in an individual event or committee first.

Diversifying Your Board

To ensure that you have a variety of participants at your events, your board of directors should reflect the audience that you want to attract. In other words, you must diversify your board. Recruit members of different races, religions, ethnic origins, ages, and even majors. Don’t forget
student representation, if possible—they are our future alumni. Parents of current students can also be a good resource.

Recruit volunteers from different areas of the professional community as well. They should possess different qualities or expertise. Avoid recruiting the majority of the board from a single source. Structuring a diverse committee offers you a wonderful opportunity to develop new relationships.

**Places to Look for Potential Board Members**

- Chapter and Alumni Association events
- Chamber of Commerce
- Local government offices
- Banks, local accounting firms, financial investment firms, law offices and other professional services organizations
- Schools; board of education
- Houses of worship
- “Mommy/Daddy and Me” or other stay-at-home parenting support groups
- Civic clubs (e.g., Rotary International)
- Marketing departments
- Media outlets
- City or county park and recreation departments
- Sororities and fraternities
- Retirement homes
- Previous board members
- Faculty and staff
- Chapter outreach (newsletters, surveys, website, etc.)
- Facebook, and other online forums

**Committee Structure**

Committees serve an important role in any successful organization. They provide volunteer opportunities for alumni who do not want the full commitment of being on the Board of Directors but would instead like to help with a specific task. The committee structure can also serve as a way to cultivate future leaders.

**The Role of Committees**

A committee’s size, the expertise of its members, and its charge enable it to deal with issues in greater detail than the full board. Since small groups are often more efficient at problem-solving than large groups, committees can analyze issues more completely and reach more thoroughly deliberated recommendations. There are generally two types of committees:
1. Standing committees are permanent and are established in the organization’s bylaws. They relate to the ongoing governance of the organization.

2. Ad hoc or “special committees” have a time limit and are created for a specific purpose. Ad hoc committees are disbanded when they have accomplished their goals.

**Committee Size**
The size of a committee depends first on a common-sense assessment of how many people are needed to do its work. Size also relates to the needs of the board and the organization, the size of the full board, and the availability of board members.

**Committee Composition**
Work will be most productive when the committee members are knowledgeable, committed, and work well as a team. For this reason, committee appointments should be made with careful attention to the mix of skills, perspectives, and personalities of members. In addition, every board member should serve on at least one committee, but preferably no more than two. Finally, it is essential that members not be overextended. They should be assigned to committees based on an evaluation of their experience, skills, interests, and availability.

**Chairperson’s Role**

1. Serve as a liaison between the committee and the board of directors.
2. Set the tone for committee work and ensure that members have the information they need to do their jobs.
3. Assign work to committee members, set meeting agendas, run meetings, and ensure distribution of minutes and reports to members.
4. Initiate and lead the committee’s annual evaluation, a time when members review their accomplishments in relation to committee goals, and reflect on potential areas of improvement.
5. Report to the full board on committee decisions, policy recommendations, and other committee business.

**Committee Member’s Role**

1. Have a serious commitment to participate actively in the committee’s work, including being prepared for and participating in meeting discussions.
2. Volunteer for and willingly accept assignments, completing them on time.
3. Stay informed on committee issues and prepare for meetings.
4. Build a working relationship with fellow committee members.
5. Participate actively in the committee's annual evaluation.
Recommended Standing Committees

The following is a list of recommended committees that address specific and ongoing business within the chapter. Each includes a brief description as well as specific responsibilities.

**Executive Committee:** Recommends actions for approval of the full board and sometimes acts for the board, within its boundaries, between meetings. This is the central committee of the board and is essential to its effective operation and defining committee structure. Typical tasks and responsibilities include:

1. Meet regularly to review operational, programming, and financial issues. (The executive committee is held accountable for fiduciary responsibility and oversight.);
2. Deal with urgent situations that cannot wait for the next full board meeting.

**Nominating Committee:** Determines the composition of the board by identifying, recruiting, and proposing board candidates. In some situations, this committee also takes on the following responsibilities:

1. Lead in the identification of board candidates.
2. Develop written descriptions of board member responsibilities and create a plan for identifying candidates for these positions.
3. Develop and nominate board officers.
4. Plan and conduct orientations for new members.
5. Lead the annual evaluation of individual board members and the board as a whole.

**Membership Committee:** Coordinates the chapter’s membership efforts.

1. Promote membership in the chapter and in the Alumni Association.
2. Responsible for determining chapter member benefits.
3. Collect membership applications and dues—forward dues to treasurer.
4. Maintain a comprehensive list of all members.

**Finance Committee:** Coordinates the board’s financial responsibilities. Some of the tasks to be taken on by this committee include the following:

1. Manage dues of the organization.
2. Oversee any group fundraising.
3. Oversee the group’s assets.
4. Review the annual budget and make recommendations to the full board.

5. Monitor ongoing budget and financial procedures, including review of monthly financial reports.

6. Manage/oversee the organization’s investments, including endowments.

7. Ensure compliance with Alumni Association and IRS procedures, guidelines, and filings.

**Communication Committee:** Responsible for all communication needs of the chapter.

1. Maintain various communication avenues used by the chapter, including newsletters, list serve, website, and more (your webmaster should be a member of this committee).

2. For more information, see “Communication” section of this handbook.

**Scholarship Committee:** Lead chapter fundraising efforts.

1. Organize events that will raise funds to support Penn State students.

2. Work with Penn State’s Office of Development to ensure compliance with all necessary guidelines.

3. Coordinate awarding of scholarships with Penn State’s Office of Student Aid.

**Social/Program Committee:** Provides logistical support of and implementation of the board’s ongoing programs and activities. Some examples of programming include the following: the speakers program, freshman sendoffs, bus trips, happy hours, community service projects, etc. Some common responsibilities for this committee include:

1. Recommend program policies to the full board.

2. Set guidelines for board involvement in program matters.

3. Monitor implementation of the strategic plan’s programming goals.

4. Recommend potential program initiatives to the full board.

5. Report to the board on a regular basis on the organization’s programs.

**Student Involvement Committee:** Focus on interaction with Penn State students.

1. Plan student sendoff event.

2. Organize events and activities around current Penn State students and/or student organizations traveling during the semester or during breaks.

3. Offer career and networking opportunities for current students, including those participating in local internships.
Young Alumni Committee: Coordinate events specifically aimed at young alumni.

1. Plan and organize events focused on attracting young alumni to your chapter.
2. Involve young alumni in the chapter and train possible future board members.

Alumni Admissions Committee: Alumni admissions volunteers assist the Undergraduate Admissions Office in recruiting qualified students for Penn State. Alumni volunteers’ “personal touch” often encourages a student to apply to Penn State and accept an offer of admission.

1. Alumni volunteers participate in local recruitment activities such as college fairs and high school visits. In essence, volunteers become ambassadors for the University, acting as local contacts for students, families, and counselors.
2. Specific activities include: college fairs, Lions ROAR, prospect receptions, offer receptions, chat rooms, high school visits, and student sendoffs.

Planning Great Meetings

While there are many approaches to conducting successful meetings, we have found that the following ways ensure productive, memorable meetings. Your group may decide for itself how many meetings to have each year, but a good guideline is that the board should meet quarterly, with committee meetings more frequently.

1. Schedule your meetings well in advance. We would even suggest that you develop an annual calendar for your meetings so that people can plan ahead. It is also a good idea to have a regularly scheduled meeting time (e.g., the second Tuesday of each month).
2. Publish and distribute an agenda at least one week before the meeting.
3. Set the tone for the meetings. It is up to you to determine whether your meetings will be productive or not, whether they will be positive or not. Communicate the importance of everyone attending the meetings.
4. Value everyone’s time. Start and end the meeting on time. Try to limit meetings to one hour.
5. Ask committee chairs to prepare and submit written reports prior to the meeting. (This will also assist the secretary with minutes.)
6. Stick to the agenda. Stay on topic. Ask participants to notify you ahead of time with any items that need to be included on the agenda. There may be a tendency to drift on to topics about personal subjects or topics not relevant to chapter business—encourage these topics to continue once the official part of the meeting has concluded.
7. See that all members have a chance to participate.
8. Maintain control over meetings. Don’t let one member dominate the meeting. If you have members who are prone to take over the meeting or talk for a long time, place their reports at the end of the agenda. Upon reaching that section of the agenda, bring everyone’s attention to the amount of time left. This is an indirect way to limit individuals.
9. Demonstrate progress. It is important that everyone feels that they are accomplishing something and not rehashing the same topic every meeting.

10. Ensure that assignments for follow-up action are clearly understood.

11. Be sure that minutes are provided in a timely fashion following the meeting. A good guideline to follow is within two weeks of the meeting.

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**Keeping Your Members Motivated**

Different members are motivated for different reasons. What one member perceives as a motivator may not be the same for another. Though everyone in your chapter has pride in Penn State, this may not be his/her only motivator. Develop relationships with members. Get to know why they chose to volunteer and determine their motivators.

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**Show Your Appreciation**

Did you know a person has to hear the words “thank you” seven times before they truly feel thanked? This offers you a wonderful opportunity to build a relationship with each volunteer throughout the year. Day-to-day recognition is the most effective type of recognition for changing an organization’s culture and individual behaviors. Day-to-day recognition requires regular feedback to reinforce desired behavior. Over time, recognized behaviors happen more often than behaviors that go without recognition.

Here are a few every day and special recognition tips/suggestions:

1. Smile and be pleasant.

2. Provide good training.

3. Take time to explain things fully.

4. Write handwritten thank-you notes to both volunteers and to their family members.

5. Send cards (birthday, anniversary, sympathy, etc.).

6. Greet people by name.

7. Be verbal (i.e., talk to people), but also listen.

8. Acknowledge publically.

9. Simply say “thank you” for your hard work.

10. Take note of special moments (wedding, birth, new job, etc.).

11. Ask to coffee/lunch.
Pitfalls to Avoid
There are two major pitfalls that you need to avoid as a chapter leader.

1. **Doing it all yourself.** Many chapter leaders short-circuit their potential by taking on work that should be accomplished by committees. You cannot be an effective leader and fill all the other positions as well. Empower your members. Offer suggestions, but encourage them to make the final decision and get the job done.

2. **Deciding alone.** Though you are the leader, it is not expected nor recommended that you make the decisions yourself. Remember that it is a partnership with your other board members, committee chairs and membership. Pertinent information needs to be discussed at your board meeting for all to decide. By including others you gain different perspectives, more resources to draw upon and more commitment to the decision.

Benchmarks
Several benchmarks have been developed to help you assess the health of your chapter.

1. A healthy chapter structure has actively involved members.

2. The elected board and officers should reflect the diversity of your potential membership pool (e.g., age, gender, race, profession, socio-economic status, etc.), with specified terms of office and assigned functions for each board position.

3. Regular board meetings need to be publicized in advance and held at convenient times and locations, which are open to members and potential members.

4. Written agendas, minutes, and financial reports should be circulated to the greatest number of members possible and copies should be sent to the Alumni Association.

5. The most successful chapters offer a breadth of programming and services. (See “Developing Annual Goals” in “The Chapter Expectations” section.)

6. Healthy chapters create specified programs for leadership succession, that include:
   a. Limited terms of office for all officers and board members.
   b. Leadership training for a “president-elect” and officers, along with identified emerging leaders.
   c. A designated board position responsible for identifying new board members and officers (the immediate past-president often fills this role as chair of the Nominating Committee).

7. The chapter should develop a strategic/work plan and complete annual reports that reflect and measure meaningful involvement by significant numbers of alumni in the area.
COMMUNICATION

How one person prefers to communicate is not necessarily another’s preference. It is best to diversify your methods of communication in order to reach the broadest audience possible. Below are few suggestions.

**Communication Allocations**

The Alumni Association provides funds for chapters to communicate with their members and potential members. This funds allocation is based on a formula considering the number of current Alumni Association members, alumni who have let their membership lapse in the past five years in your area, the current postage rate, and a small allowance for printing costs. For more information on the communication allocations see the “Financial Support” subheading in the “Association Support” section of this guide.

**Developing Your Strategy**

When developing a communication plan for your chapter, keep in mind the following:

1. It is a crowded landscape out there, and you are competing for each person’s attention in a 24/7 information environment.

2. Technology is constantly changing, and it is important to keep up on the preferences of your audiences when it comes to information sharing.

3. Recent data shows that 75 percent of adults 65 or older with a college degree are online. Be cautious of stereotypes that say only “young people” use social media or other online platforms. Take time to ask and learn about how your audiences are communicating on a daily basis.

4. Using multiple forms of communication—print, email, in-person—typically lead to greater success when sharing messages. Test and try options to learn what works best for your group.

Consider these four questions when developing your communications plan.

1. **Audience**—Who receives your messages?

2. **Vehicles**—How will you communicate?

3. **Packaging/Distribution**—What will it look like? How will it get to the audience?

4. **Timing**—When or how often will it be received?

**Newsletters**

Chapter newsletters can be a very effective way to communicate regularly with your membership. Newsletters can be mailed either in hard copy or electronically. When deciding which method will work best for your chapter, keep in mind that the Alumni Association database only contains email addresses for approximately half of our alumni.
Groups receiving an allocation should always use their official mark provided by the Alumni Association on all printed and online material. The official mark contains both the name of the chapter and the Alumni Association. If you do not have a copy of your mark, contact your regional director to obtain one.

The following are some tips to follow when creating your newsletter:

1. Sections: Divide your material into logical sections. This will make it easier to read and more visually interesting.

2. Topics: Be sure to include a variety of topics. Report on chapter news, featuring both what has happened and what is to come. Consider adding special features (e.g., Alumni Spotlight or Student Focus).

3. Typeface choices: Don’t get overloaded with too many different typefaces. Use only what is needed to make important information standout.

4. Colors: The use of color can add pop and vitality to any newsletter and make it more visually interesting. While color copying may be out of your budget for a hard copy mailing, be sure to include color in electronic communication pieces.

5. Photos: Replace “grip and grin” shots with action images, which are more interesting and eye-catching. Consider taking photos from different angles or take advantage of special lighting. The more photos that you take, the more likely you are to get one you really like and can use in your newsletter or online.

Electronic Communications

Electronic communications can be an effective way to reach your membership. Information can be disseminated immediately and updates are often easier than other methods. The most important thing to remember is to keep your online information up to date or people will not continue to use or read it. The more interactive—or action-oriented—you make your communication, the more successful it will be. Below are some common methods of electronic or online communications.

**Email**
The Alumni Association has email addresses for approximately half of our alumni. We can provide a list of email addresses for alumni in your area the same way that you request mailing address selects, and you will need to specify the intended use when you submit your request. Email address lists are intended to be single-use lists. The exception to this would be using a list to create a listserv, and then it is important to offer people a way to opt out of the list. Many chapters also use email lists to create accounts with online companies for the distribution of e-newsletters and e-vites. Be sure to only work with companies who protect your information and do not sell or share email addresses with other companies.

**Social Media Sites**
Social media is currently the fastest-growing method of communication. Some of the more popular sites include:
Blogs
Blogs can be another efficient way to share information with your membership, but don’t rely on one person to do all of the posting. Varied opinions make the information more attractive to read and follow. Blogs can be blended with other forms of communication, including your newsletter and website.

Websites
We encourage all of our affiliate groups to create a website. The most effective websites have current and up-to-date information and are changed often to keep people coming back. The Alumni Association offers web tools and hosting to any group upon request. The space includes the use of templates and tools to generate web pages. Contact your regional director if you are interested in using this service. Chapter contact information, including the name and email address of a volunteer responsible for web development, will be required.

The following are a few tips for creating successful websites:

- Post up-to-date information.
- Include an events section, calendar of activities, and photos.
- Post any current newsletters or other e-communication regularly.
- Acknowledge new members who have joined your group.
- Provide links to related websites, such as the Alumni Association’s site (alumni.psu.edu).

Logo Usage and Visibility Guidelines
The University maintains strict control over the use of its trademarked logos and marks. As such, it is important to understand what you can and cannot use when developing your printed materials and other promotional items. Our Strategic Communications team has developed a document to help walk you through using your logos. It can be found in the Volunteer Toolkit under “Graphic Standards and Visibility Guidelines.”
Communication Between the Alumni Association and Chapters

Your primary point of contact for any communication with the Alumni Association is your regional director. He/she will either answer your questions directly or will refer you to the appropriate person. The Alumni Association uses various methods to communicate with and support its affiliate group leaders.

Email
Every president needs to provide his/her regional director with a current email address. This is the primary way that we communicate with our leaders. Please check your email regularly to ensure that you are not missing important information from the association. You should also get into the habit of checking your spam/junk folder. Every spam filter is different and some are more sensitive than others—a single, seemingly innocent word can trip a filter and send an email to your spam/junk folder. While most of the email you receive will come from your regional director, important messages will be sent from other people within the Alumni Association as well. Do not rely solely on your safe senders list; check your spam/junk folder regularly.

Social Media Sites
The Volunteer Services team works to stay current with communication trends; you can find most of them on at least one social networking site. This can be a great way to keep in touch with your regional director as well as to learn a little bit more about one another.

The Alumni Association as a whole also has a presence on a number of social media platforms, including Facebook, LinkedIn, and Twitter.

Website
The Alumni Association maintains its own website, which is updated routinely. You are encouraged to visit the site often—alumni.psu.edu. The website also contains a section dedicated to our alumni groups, which includes the contact information for the presidents of each of our affiliate groups, as well as the Volunteer Toolkit. Locate this under the “Alumni Groups/Resources” site section.

Volunteer Toolkit
The Volunteer Toolkit is where you will find a great deal of useful information and forms necessary to be successful as a chapter leader. The Volunteer Toolkit is a companion resource to this guide. Most of the forms and links referenced in this handbook can be found on the Alumni Association’s website in the Volunteer Toolkit.
EVENTS & ACTIVITIES

Special events and activities are the lifeblood of any Alumni Association affiliate group. It is through programming that alumni connect with each other. Events may be purely social or may contain philanthropic themes; they may welcome new alumni or send off new Penn State students. No matter what the purpose, it is important to carefully plan and execute events, and to conduct thoughtful and meaningful evaluation afterward. For a full list of programmatic areas, see “Developing Annual Goals” section of this guide.

Event Checklist

Before You Begin
• Assign the event to a standing committee or create an ad hoc committee.
• Create a working budget.
• Formulate a timeline.

Location
• Choose a site for your event. Do an in-person visit to see the facility.
• If an insurance certificate is required, contact your regional director.
• If a contract is required, review the contract with your regional director.
• Consider the size of venue, parking availability, accessibility, privacy, and sound quality.

Meals, Breaks, Reception
• What is your estimated attendance?
• What time is the break?
• What time is the reception?
• What time is the dinner?
• Set food and beverage service.
• Will there be a cash bar or open bar (see insurance coverage in the Business and Operations section of “Association Support” for more information on liability and alcohol)?
• Will there be wine with dinner?
• Set the price (including tax and gratuity per person).
• Determine the seating.
• Will there be a head table?
• Reserved table(s)?
• VIPs interspersed with guests?
• Guarantee the exact number of attendees with the event site approximately 72 hours prior to the event.
• Does the site set for more than the exact reservation number?

Setup and Decorations
• If presenting awards, have a table near the podium for the awards.
• Have an information table with membership forms for both the chapter and the Alumni Association.
• How will you decorate the location—balloons, flowers, plant rental?
• Where will you display your chapter banner?
• Where will people check in and register at the event?
• Will you be using nametags?
• If you are having favors or giveaways, how will they be shown and distributed?

Program
• Determine who is speaking.
• Have their correct titles and the order of speaking.
• Select an emcee for the evening.
• Do you wish to use a program? If yes, have multiple people proofread.
• Will you be doing a raffle or auction? When will winners be announced?
• Determine the type of entertainment, if any. If a piano is needed, arrange for the event location to have one available. Be sure it’s tuned and ready.

Promotion
• Be sure you have an up-to-date list of addresses for sending invitations.
• How will you announce your event?
  • Postcard?
  • Newsletter?
  • Newspaper?
  • Website(s)?
  • Social networking site(s)?
  • Email/E-vites?
• How will people purchase tickets or register for the event?
• Post of the Alumni Association website.

After the Event
• Prepare an event summary.
  • Update registration and summarize:
    • Number of reservations
    • Attendees
• No-shows
• Complementary/no-charge guests
• Volunteers on duty
• Other breakdowns as might be necessary
• Final budget
• Follow up on payments to vendors.
• Evaluate the event.
• Complete an Event Report Form in the Volunteer Toolkit.
• Write thank-you Letters.

**Helpful Hints:**

1. If your group is having a speaker and/or awards, or entertainment after dinner, be sure to specify with the event site’s banquet manager when you want the tables cleared. You may want them to be cleared before or after (not during) the program.

2. If your event includes a special speaker, don’t forget to apply for a speaker grant (available once per fiscal year). For more information, see the financial support section under “Association Support.”

3. When there are large numbers of attendees, consider the type of appetizer you choose. (For example, soup is hard to serve to a large group because it has to be kept at a certain temperature.)

4. Be sure to receive a written confirmation from your event site for your menu and setup details prior to the event.

**Student Sendoffs**

Nearly 100 student sendoff events are held each summer by our affiliate groups.

**Definition**

The Alumni Association provides lists to chapters of incoming students.* Chapters use these lists in various ways: for student sendoffs, care packages, letters of welcome, and involvement of parents in the chapter. Since it’s important to have a current-student perspective at these events, the association also makes available lists of current students that you may contact to invite to your event. When you contact current students, you may want to ask them to serve on a panel with young alumni to answer questions or to facilitate small group discussions with incoming freshmen. Students who are active in the Blue & White Society and those active in the Lion Ambassadors are excellent resources. The Alumni Association can identify students from your area who are active in these organizations upon request. Chapter members’ children can also be a friendly addition to your sendoff.

*The Alumni Association receives two lists from Penn State’s Undergraduate Admissions Office. The first list is paid accepts as of May 15. The second list is paid accepts as of June 15. Based on your event date, we will send you the more complete June 15 list.

**Getting Started**
If you are planning a student sendoff, you will want to begin planning early. Beginning in May of each year, the Alumni Association will send out notices that it is time to register your event and request your student lists. The form can be found in the Volunteer Toolkit. When completing the form, you will need to know the date of your event, and whether you want only new students or both new and returning students. Requests are processed in order of event date. If forms are submitted without an event date, they will be processed after sendoffs with a set date. Completing the online form is the catalyst for receiving both your student lists and giveaways from the Alumni Association.

**Invitation**
Since freshmen are recent high school students (although they are not likely to admit it!), they may not know what an alumnus/a is. Most of them don’t yet understand the Penn State system, and they are being inundated with information from the University. Design your invitation with this in mind. Some suggestions for invitation formats include:

- Make your invitation fun to read, humorous, simple, and direct.
- Leave plenty of white space and avoid a letter format.
- Use a postcard or self-mailer.
- Bounce the invitation design off some young alumni to see what they find attractive.

Some additional suggestions include:

- Encourage each freshman to bring a friend (they’d rather travel in pairs).
- Offer transportation.
- Include a physical address for the event for people to use with their GPS units.
- Note that directions are available on your website. Be sure to include your web address and post the directions there.
- Consider including the address of any social networking sites you may use, and post information about the event on them.
- Follow up the invitations with a phone call—a perfect job for an ad hoc committee.

**Chapter Involvement**
This is a perfect event to attract new alumni and members to your chapter. Young alumni need a purpose, and they want to see that their time is spent in a meaningful way. Enthusiastic and fresh out of school, they are perfect for interacting with potential or new students. Look at your printout and extend an invitation to a few young alumni; ask for their help. It is, of course, also crucial that chapter members of all ages be present. We need to show the students just what being a member of the Penn State family means!

Use volunteers as greeters where freshmen and parents will arrive. Make sure not to cluster as chapter members; these freshmen are nervous, and so are their parents! Be sure to have
membership information available for parents. You are their connection to Penn State while their children are on campus.

**Extras**
You may want to consider distributing “Penn State Mom” and “Dad” buttons. They can be ordered and purchased through the Penn State Bookstore (800-543-5659), Lion’s Pride (800-462-0068), the Student Bookstore (800-373-4585), and McLanahan’s (800-367-8081).

Make sure you hang your banner and wear your Penn State blue and white! Give participants blue-and-white ribbons to wear (or anything that will make them feel part of the crowd).

If you have the time, compile a list of all local attendees and distribute it to each freshman for networking purposes. Parents will find this helpful too!

If you can, split up the parents and students for a while and have a recent alumnus/a and/or a current student with the new students. You’ll find the students are inhibited about asking questions with their parents present. You’ll see a world of difference when they’re on their own.

**Football Viewing Parties**
Football-viewing parties can be a chapter’s most visible and well-attended events. With that in mind, it is important to make the most of these opportunities. Below are a few tips:

1. **Post ‘em.** Make sure your events are on your Website, in your newsletters, and in the Alumni Association online alumni group events posting.

2. **Be visible.** Decorate inside and outside to draw Penn Staters in and build a vibrant atmosphere. Also, ensure leadership is identifiable through special nametags, shirts, etc. It is helpful to identify specific board members to serve as greeters during your party to ensure that no one feels left out and to encourage people to mix and mingle.

3. **Be strategic.** Set specific goals for group leadership. Consider personally interacting with a set number of general members to discuss a subject that is of top priority.

4. **Make the viewing party an experience.** As the Big Ten Network and cable continue to offer our alumni more viewing options at home, your group must make the parties an experience ... not just a place to catch the game. Consider fun games, trivia with prizes, “mic man” contests, awards for “most spirited” or “best dressed”, VIP seating areas for high bidders or raffle winners, and more!

5. **Capture attendees’ information.** This may sound simple but be sure to collect phone numbers and email addresses (on average, only 40 percent of all email lists are current). Have a table as soon as folks enter, and use the sign-in sheets to award prizes at halftime.

6. **Recruit new members:** Make sure members and non-members see the benefits of membership! Try to talk the host site into offering group members one free round, a discount on food, or other specials.
7. **Inform attendees of future gatherings and projects.** Whether it’s viewing parties, non-profit volunteer efforts, social hours, networking events, or a scholarship fundraiser, let the attendees know about it.

8. **Get Feedback:** If you want to offer programming and maximize involvement, you need to offer relevant activities. Have a quarter-sheet that collects contact information and comments. This way you find out your members’ interests and gather names of someone who may help get the project off the ground.

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### Golf Tournaments

Many groups use golf events to raise money for philanthropic purposes. Since so many of our chapters host/sponsor these events, we felt it was important to offer you some information and standards to help you with your planning.

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### Why Golf?

According to IEG, LLC, the world’s leading authority on sponsorship, there are four answers to this question. Golf is the sport of business. It is the second-most-sponsored sport. It is the sport most sponsors want to play. And, it is the sport with the most sponsorship growth potential.

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### Committee Composition

When identifying potential committee leaders, you should consider recruiting key business leaders. They have great knowledge and contacts. Work with your location to invite a golf pro to serve on the committee as an expert. Identify which committee roles will be considered leadership roles and identify key people to serve in those positions. Uncover and identify potential resources that each committee member/leader will bring to the planning process. Make sure that each committee member is clear as to their assignments and responsibilities.

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### Sponsorship Dos and Don’ts

**Do:**
- Get to the sponsors early! (Know their fiscal year calendar.)
- Get to the decision-maker; cultivate a “door opener.”
- Conversation first; written proposal second.
- Prepare a presentation that is top-notch and has that “WOW” factor.
- Be flexible in what you ask for (the sponsor also has needs).
- Identify unique opportunities for the sponsors.
- Listen to the sponsors! Find out what their needs and wants are.
- Be able to justify what you are asking for.
- **RESEARCH YOUR PROSPECTS!** Find out important information about your sponsors—their product, their market, and their key people—before you meet.
- Know what your event is worth.

**Don’t:**
- write first ... call later;
- offer the “same old same old”;

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• throw other potential sponsors and competitors in your sponsor’s face (i.e., “If you don’t come aboard, ...”).
• name drop ... unless you can back it up;
• be rigid;
• overprice or undersell your event.

* Source: Mr. Lowell Connor, Senior Vice President Corporate Relations, AT&T, 1998

## Rain Insurance

One of the greatest threats to running a successful golf tournament is cancellation due to inclement weather. Often the golf course is not available for rescheduling. Consequently, the entire revenue may be lost for the current year together with the usually non-refundable expenses incurred for food and beverage. Rain insurance indemnifies the tournament organizers for financial loss caused by rain.

Unlike hole-in-one insurance, this insurance can be expensive. It is IMPERATIVE to know what the host club’s policy is regarding rain and its impact on the tournament. A rain plan should be in place before the event, and all golfers should be informed of the inclement weather plan. If the event is a half-day event, a rain delay may allow the weather to pass and play may resume. If it is a double shotgun, each shotgun may have to be shortened. If play has to be shortened, the committee should already have decided how the winners would be determined.

## Creating the WOW—Tournament Day

### Upon Arrival:
- Have greeters at the gate who can radio ahead the names of the guests as they arrive.
- Have volunteers tag and take golf bags so golfers can proceed to registration.
- Consider valet parking with cars washed during play.
- Provide golfers with premium tee gift.
- Volunteers “check” their gifts and any other items not needed while on the course.
- Provide a continental breakfast.
- Have a shoe-shine station in the locker room.
- Make sure you have pros available on the range and putting green giving tips.
- Make the “Call to carts” unique—e.g., trumpeter playing “Hail to the Lion.”
- Welcome all participants, explain the event’s format, make announcements, and carts depart.

### On the Course:
- Offer beverages and snacks—possibly something, special such as smoothies.
- Hold special contests along the course.
- Hole-in-one: If a player makes the hole in one on a designated par 3, the player wins the announced prize. The golfer is responsible for all applicable taxes. A volunteer may be required as a witness on the hole.

- Putt for cash: Qualifying rounds may be held prior to the tournament and the finals held immediately following the event. A video of the final putt may be required.

- Closest to the pin: A proximity marker is placed on the green and any player who comes close to the pin (on the green) marks the spot with the proximity marker. Some courses will provide a tape measure instead and the golfer records the distance from the pin on the marker and the golfer’s name. After all teams have played through this hole, the player who came closest to the pin is the winner.

- Straightest drive: A designated hole is chosen for this contest and a line is marked down the middle of the fairway by the golf pro. The player whose drive comes closest to the line is the winner.

- Longest drive: A marker is placed on the fairway of the designated hole. As each team plays through, a player whose drive passes the marker is responsible for repositioning the marker and placing his name on the marker. After all teams have played through this hole, the player whose name appears last is declared the winner.

- Hold a lunch cookout on the course.

After the Round:

- Host a 19th Hole Reception.
- Prepare a program and awards presentation.
- Be sure volunteers pass out stored tee gifts, items, and a parting gift.
- Once golfers depart, committee members and volunteers sigh with relief!
Scholarship/Student Support

Our affiliate groups currently have more than $8 million in endowed scholarships administered through the University. Support of current students is a critical goal for all of our groups to keep in mind.

Endowed Scholarship Program

Endowments are gifts made to the University, with the restriction that the principal may not be spent. Instead, it is invested to provide a steady income for the continued development of academic programs. What you do today can be of benefit to many tomorrow.

One way to ensure a long-range impact on the University is to permanently endow a scholarship that nets annual awards in the name of the chapter. At this time, the minimum amount required for a named endowed scholarship is $50,000. Every year, a portion of the income from the endowment is awarded to a student who has achieved academically and meets the criteria established by the chapter.

Chapters around the country have taken up the challenge and are working to endow their funds to guarantee a Penn State education for future generations. Individual alumni benefit too. Not only do they help deserving students experience a Penn State education, but they also earn tax deductions for their donations. Many awards are eligible for matching-gift funds from among some 1,250 companies that match employee contributions to Penn State.

Chapters participate in establishing the rules for administering their scholarships. Staff in Penn State’s Development Office will handle the details, but the chapter’s desires are incorporated to guarantee the scholarship in perpetuity.

The Alumni Association staff stands ready to assist Penn State chapters in creating endowments. For more information on endowed scholarships, call your regional director.

For additional information on giving to the Penn State Alumni Association visit our web page at alumni.psu.edu/development.

General Guidelines For Endowing Scholarships

1. Submit a request to raise funds in writing to the Alumni Association, describing the purpose of the project. (Note: You will work with your regional director and the Alumni Association’s director of development).

2. The Alumni Association staff will review and evaluate your request.

3. The director of development will continue to work with your group to assist you with fundraising activities.

4. Fundraising progress will be reviewed on an annual basis as part of the goal-setting efforts and planning process of the Alumni Association.
5. Fundraising monies should be kept separate and distinct from other chapter funds.

6. After gifts are received by Penn State, expenditure of funds will follow University guidelines for expenditures of gifts.

**Requesting Autographed Items to Support Your Scholarship**

Items must be requested directly through the Department of Intercollegiate Athletics Compliance Office. The form to request Items can be found in the [Volunteer Toolkit](#). Once approved, items to be signed may be purchased through the Penn State Bookstore.

Important guidelines to keep in mind:

- Generally, only requests made by a bona fide charitable or educational organization will be considered.

- Per NCAA rules, the University may not assist with requests benefitting high school groups or students, two-year colleges, or sports teams that include participants in grades 9–12.

- **Please note:** Athletics may only approve requests for scholarship-related causes if the scholarship funds are administered through the Penn State Office of Student Aid. It is not permissible to assist the local chapters if they administer scholarship funds directly to the recipient of the award before the recipient begins classes.

- Donated items may be auctioned only by the requesting organization.

- You must clearly state how any donation proceeds will be used and if they are to go to scholarships.

**Other Ways To Support Students’ Academics**

If your chapter does not have the ability to endow a scholarship, there are still other ways that you can support students. Some chapters award students gift certificates for the Penn State Bookstore at their annual student sendoff event. Others offer an annual scholarship from money they raise during the fiscal year. Still others offer an emergency fund to which students can apply for help with emergencies or special circumstances. For more information on what your chapter can do to support academics at Penn State, talk to your regional director.

**Penn State IFC/Pan-Hellenic Dance Marathon**

The mission of the Penn State IFC/Panhellenic Dance Marathon—better known as THON—is to conquer pediatric cancer by providing outstanding emotional and financial support to the children, families, researchers, and staff of The Four Diamonds Fund.

The Dance Marathon Alumni Interest Group (DMAIG) has put together an online guide to help other affiliate groups. It includes a brief history of THON, an overview the Alumni Association’s support, and ideas for events. It can be found in on the resource page of our website at [alumni.psu.edu/groups/volunteer](http://alumni.psu.edu/groups/volunteer).
Local Community Service Activities

Penn Staters like to give back—to their alma mater, to THON, to their community. You will find that people join your chapter for many different reasons. One of those reasons for some is to find a group of people with whom they can volunteer and better their local community. The following are some suggestions of community service activities with which your chapter may want to get involved.

1. Choose a national non-profit organization with an office in your area and support their efforts (e.g., Habitat for Humanity, Relay for Life, American Red Cross).
2. Clean up a local road or attraction such as a stretch of highway or a local beach.
3. Volunteer at your local soup kitchen or food pantry.
4. Contact a national or state park in your area and ask if they have any projects with which they need help.
5. Work with your local schools and/or youth sporting leagues to maintain fields and help in others areas where needed.
6. Get creative! Identify a need in your community and offer to fill it.
AWARDS AND RECOGNITION

The Penn State Alumni Association supports an extensive awards and recognition program, honoring achievements of alumni throughout the world. In the area of affiliate groups, the Alumni Association offers awards to recognize societies, chapters, individual volunteers, affiliate program groups, and alumni interest groups. All groups are invited to participate in our annual awards program. A timeline and nomination forms for the awards programs can be found on the Alumni Association website on our Awards page.

Affiliate Group Awards

Awards are given to affiliate groups that have distinguished themselves through exceptional programming in the following categories. A call for nominations will be sent out to all group leaders prior to the deadline each year (typically March 1). Recipients are selected by Alumni Council’s Awards Committee. A program grant of $500 will be given to the winning groups to be used in future programming. Descriptions of each of the categories listed below along with award recipients can be found at alumni.psu.edu/awards/group.

- Communications
- Fellowship and Networking
- Joint Activity
- Membership
- Outstanding Service Project
- New Innovative Event or Program
- Professional Development
- Scholarship and Fundraising
- Student Interaction
- Young Alumni Involvement

Individual Volunteer Awards

The Alumni Association is committed to recognizing alumni from across the academic spectrum, especially those from diverse backgrounds and those who are making a positive impact to ensure a truly diverse, inclusive, and equitable institution. As such, the Alumni Association recognizes a number of alumni each year through individual awards. A complete list of those awards with descriptions, honorees, and nomination forms can be found on our website at alumni.psu.edu/awards/individual.

Four of these individual awards are included as part of our Volunteer Awards program and follow the same timeline as the Alumni Group Awards noted above.

- Joan M. McLane Recent Alumna/Alumnus Award
- K. David Weidner Diversity Award
- Kay and Ernie Salvino Volunteer of the Year Award
- Philip Philip Mitchell Alumni Service Award
Groups of Distinction

The Group of Distinction program was established in 2003–04 to recognize groups engaging in numerous and relevant activities and programming. Working with the Alumni Council’s Volunteer Support Committee, the program has been updated to address current priorities and initiatives of the Alumni Association and our affiliate groups.

The 15 categories used to determine group of distinction status represent organizational priorities of the Alumni Association and recognize groups that are truly active and focusing their work on these priorities. The categories can be found in the section of this guide on “Developing Annual Goals.” To be considered for group of distinction status, groups must be in good standing. See section on “Maintaining Active Status” in the guide.

The method for gathering this information in order to determine groups of distinction is the annual report. Results are announced during the fall semester.
CALENDAR OF EVENTS

Chapters and other affiliate groups are free to set their own calendars in relation to meetings and events; however, the Alumni Association, in general, follows an annual calendar that delineates its (and the University’s) ongoing events. Dates are subject to change, but the list below should give you a good place to begin.

<table>
<thead>
<tr>
<th>January</th>
<th>February</th>
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<tbody>
<tr>
<td>Bowl Tour (when applicable)</td>
<td>IFC Pan-Hellenic Dance Marathon</td>
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<td></td>
<td>City Lights</td>
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<tr>
<th>March</th>
<th>April</th>
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<tbody>
<tr>
<td>Affiliate Group and Individual Volunteer Award Nominations due</td>
<td>Capital Day in Harrisburg</td>
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<tr>
<td>Spring Break</td>
<td>Blue-White Weekend</td>
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<tr>
<td>City Lights</td>
<td>Spring Meeting of Alumni Council</td>
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<td></td>
<td>Alumni Leadership Connections Regional Trainings</td>
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<td></td>
<td>City Lights</td>
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<td>Alumni Achievement Awards Program</td>
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<tr>
<th>May</th>
<th>June</th>
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<tbody>
<tr>
<td>Football Ticket Lottery Requests sent out</td>
<td>Football Ticket lottery drawing</td>
</tr>
<tr>
<td>Student Sendoff Request Forms Available</td>
<td>Student Sendoff lists sent (as requested)</td>
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<tr>
<td>Alumni Leadership Connections Regional Trainings</td>
<td>Traditional Reunion Weekend</td>
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<tr>
<td>Spring Commencement</td>
<td>Alumni Leadership Connections Regional Trainings</td>
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<tr>
<td>City Lights</td>
<td>Alumni Leadership Connections National Conference (once every three years)</td>
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<tr>
<td>Senior Sendoff (at the Hintz Family Alumni Center, for Penn State seniors)</td>
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<tr>
<th>Month</th>
<th>Event</th>
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<tr>
<td></td>
<td>Friend of Penn State Legislative Award luncheon</td>
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<td></td>
<td>City Lights</td>
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<td></td>
<td>Honorary Alumni and Distinguished Alumni ceremony</td>
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</tbody>
</table>
### July
- New fiscal year begins
- Chapter annual reports due
- Central Pennsylvania Festival of the Arts
- Student Sendoffs

### August
- Student Sendoffs
- Football Packet requests available

### September
- Football season begins
- TailGreats (before home football games)
- Black Alumni Reunion (every other year)
- Pep Rallies (before away games)
- Huddle with the Faculty (before home football games)

### October
- Parents and Families Weekend
- Homecoming
- Alumni Zone
- Alumni Fellow Awards Program
- TailGreats (before home football games)
- Pep Rallies (before away games)
- Huddle with the Faculty (before home football games)

### November
- Fall Alumni Council Meeting
- Affiliate Groups and Individual Volunteer Awards Dinner
- TailGreats (before home football games)
- Pep Rallies (before away games)
- Huddle with the Faculty (before home football games)

### December
- Bowl Tour (when applicable)
- Fall Commencement
- University closing (Christmas Eve through New Year’s Day)