



# **Alumni Association**

## **ULM Alumni Association Chapters & Clubs Volunteer Handbook**

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Dear Alumni Chapter Volunteer,

The ULM Alumni Association is one of the University's most important resources. I can't express how excited we are that you are willing to help us achieve our mission, objectives, and goals.

We know that your time is valuable and that you choose to spend it with us; we appreciate it more than we can express. The ULM Alumni Association is an essential link between ULM and the University's alumni and friends. Our alumni bring distinction to our University by their professional accomplishments and personal example. Through volunteers, we are able to host chapter events all over the country.

You are part of a large and dedicated group of volunteers committed to keeping ULM Alumni and friends connected to each other and the University. The ULM Alumni Association greatly appreciates the time and energy you give toward our mission, and the association staff is here to help serve you in these efforts. I personally want you to know how valued you are!

This handbook is a tool for you to use and share with your chapter volunteers, and we hope it will make your job as a volunteer a little easier. We at the Alumni Association strive to meet your unique needs. The guidelines in this handbook are to be utilized in a fashion which best serves the purpose of your chapter or club while adhering to the ULM Alumni Association by-laws and laws of your individual city/state.

Please take the time to familiarize yourself with the content of this handbook and refer all questions about procedures or policies to the Alumni Association Staff.

Your passion for ULM is profound, and your enthusiasm is encouraging. Thank you again for all you do to support ULM. Our challenge is to grow our membership, and with your help, we will be able to accomplish our goal.

Go Warhawks!



Sarah Siereveld  
Director of Alumni Affairs  
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## **University of Louisiana Monroe**

### **Vision Statement**

ULM will transform lives by bringing true equality, inclusiveness, and opportunity for all individuals in our region and beyond.

### **Mission Statement**

The University of Louisiana Monroe prepares individuals from northeast Louisiana and beyond to compete, succeed, and contribute in an ever-changing global society through a transformative education while positively impacting society through research and service.

## **University of Louisiana Monroe Alumni Association**

### **Mission Statement**

To support ULM in “changing lives”, the Alumni Association connects, engages, and fosters relationships with current and future alumni to one another and the University through communications, events, and programs.

## **What is a Chapter or Club?**

*A community of alumni that come together to celebrate their alma mater wherever they may roam, and act as local advocates for ULM. The University of Louisiana Monroe Alumni Association fosters opportunities for alumni to connect to the university and each other in ways that address special interests and common bonds.*

- **What is a Chapter?** An alumni chapter offers opportunities for alumni in a specific geographic region to connect based on their passion for the University of Louisiana Monroe.
- **What is a Club (group, etc.)?** A club offers opportunities for alumni of shared interests and common bonds to connect on meaningful levels beyond the traditional regional structure, whether that connection is based on identity, experiences, or personal interests.
  - Any graduate of the University is eligible to join any chapter or club. Eligibility should foster inclusiveness. Members will self-identify. – EX: Age requirement of a Young Alumni Chapter member is not necessary.

## **Purpose of an Alumni Chapter or Club**

- An alumni chapter or club exists to provide a link between ULM and its former students and friends through a variety of avenues:
  - **social and networking framework** for alumni and friends of the University to strengthen and renew friendships formed while students and supports the interests of ULM.
  - **information network** for ULM graduates and potential future alumni.
  - **Encourages involvement with the University through support and participation** in alumni related activities helping alumni to sustain an emotional bond with their alma mater.
- Serves as the focus of all organized alumni activities in that geographical area, or within the specialized group.
- Enhance the image of ULM and its alumni.

## **What can a Chapter/Club do?**

*Implement innovative events programs services in our 4 focus areas: social, career networking, athletics and community involvement.*

- Start a scholarship
- Fundraise for a cause or need for the University or within your targeted group
- Host events to generate engagement & pride in the University
  - Mixers/socials
  - Fundraising events
- Host career development events, clinics or programs

- Networking nights
  - Career seminars/panels with industry experts or organizational leaders
- Support Athletics!
  - Attend professional sports events
  - Organize Game-day watch parties
- Engage in local community service

# **Chapter/Club Membership**

## **Eligibility for Chapter or Club Membership:**

- Membership is open to any graduate or friend of ULM
- Be an active, dues-paying member of the ULM Alumni Association either as an Alumni Member, Alumni-By-Choice Member, or Legacy Society Member

## **Requirements for Chapter Membership:**

- Reside within the geographic area of the chapter

## **Requirements for Club Membership:**

- Participated in specific ULM sport/club/academic group
  - i.e.: Member of Sound of Today, graduated from the Honors Program

## **Requirements of Chapters/Clubs to Remain in Good Standing:**

- All members of chapter/club must be **active dues paying members** of the Alumni Association.
- All clubs and chapters must sign and return a **memorandum of understanding** each year.
- All chapter and club leadership must sign **conflict of interest form**.
- Host a minimum of **one event per year**.

## **Chapter/Club Leadership:**

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

### **Leadership Responsibilities:**

- Formulate chapter/club goals and objectives
- Organize all activities and events
- Complete the Annual Report by August 1
- Remain in contact with the Alumni Association Staff
- Submit chapter/club information and news-related items to the Alumni Office for inclusion in alumni publications.



## **Services provided by the Alumni Association:**

- **Operations & Administrative Tasks**
  - Compile membership reports
    - The alumni database can provide lists based on a number of variables (major, location, class year, etc)
  - Process and manage dues-paying memberships, and membership benefits
  
- **Financial**
  - Collaboratively create and manage annual budget
  - Process check requests, deposits, invoices, etc.
  - Hold operating account or scholarship funding
  
- **Communications**
  - The Alumni Association sends communications on behalf of the chapter to ensure all members are receiving communications and to comply with our data integrity policy
    - In most cases, e-mail messaging is preferred, but for unique or significant events, a printed and mailed piece can be requested.
    - The Alumni Association Office has the right edit communications pieces to align with ULM Alumni Association and University brand standards
  - To send an email for your chapter or club, you will need to complete the **Email request form.**
  
- **Marketing & Promotion**
  - The Alumni Association Office can **promote chapter and club activity** in multiple avenues such as:
    - Email to target audience
    - Social Media
    - Good News Online newsletter
    - ULM Magazine
      - ULM sends two issues of the ULM Magazine to all alumni per year. Chapter and Club information, updates, and other news can be included in the magazine.
    - Printed “Snail” Mail
  - **Chapter/Club Page on Alumni Website**
    - The ULM Alumni Association website (**ulm.edu/alumni**) serves as the repository of most things related to ULM alumni
    - Each chapter or club can apply for its own webpage, jointly managed by Alumni Association Office staff and chapter or club leaders.
    - For information or resources for chapters and clubs, you can reference the **Chapters & Club Webpage.**
  
- **Event/Program support**
  - Alumni Staff assists chapters & clubs with:

- Event Marketing & Communications
    - Creating & managing registration platform
    - Vendor & Partner management
    - Check-in and cash handling
  - An Alumni Association Office staff person may be present at chapter or club events if requested. NOTE: Staff is required to attend if money is being exchanged per ULM Cash Handling policy
  - Staff members are always available by phone to help with event ideas, planning, and strategic decisions.
  - An **Event Application Form** must be completed for each event held by a chapter/club.
- **Specialized logo**
    - The Alumni Association Office will provide a chapter or club logo for use on communications.

*The AA Office cannot provide digital or physical copies of any membership report as to not violate our data integrity policies and risk 501©3 charter status*

## **Financial Responsibility**

The Alumni Association provides services and support to alumni sponsored events. *Twenty-five percent of all alumni sponsored event net proceeds will be returned to the ULM Alumni Association to help offset operational costs of the Association.*

Once an alumni sponsored event has been approved, Alumni staff will inform the Financial staff with the ULM Foundation (Senior Accountant, Staff Accountant, Gift Processor, Chief Financial Officer) and the Executive Director of Advancement, ULM Foundation & Alumni.

### **Alumni Chapters:**

Chapters are operating accounts for the specific Chapters. The Alumni Staff will create a yearly budget for the Chapter. Chapters can host event/fundraise/etc. to bring money into the account and can utilize this account for their operational needs, such as hosting events. If the chapter chooses, profits from events or donations can go towards an endowed scholarship at the Foundation. Once these monies are transferred to the Foundation, they become restricted for the endowed scholarship.

### **Scholarship:**

Endowments are created with the ULM Foundation. Once the endowed scholarship is created nothing can be spent from it other than scholarship awards. It has to reach the full endowed level - \$25,000 - before earnings can be released to the operating account to award the scholarships. Chapters would work with a Foundation Development Officer to draft the needed criteria.

# Alumni Chapter/Club Fund Request

Account No.

I. NAME AND PURPOSE:

The fund has been named the \_\_\_\_\_ Alumni Chapter/Club Fund, established through contributions from its Members and net proceeds from Chapter/Club events. The purpose is to provide funding to ULM Alumni Foundation academic scholarship endowments and finance future Chapter/Club events.

II. VALUE AND FUNDING:

Chapter/Club Member contributions and net proceeds from Chapter/Club events provide funding for this account. Contributions may be added at any time.

Management of the funds will be under the direction of the University of Louisiana at Monroe Alumni Association. Reports on the status of the fund shall be made annually.

III. PROCEDURE FOR PURCHASES/EXPENDITURES:

Requests to transfer funds must be accompanied with copies of minutes of Chapter/Club Meetings.

IV. AUTHORIZING AGENT FOR EXPENDITURES (Signature of both Requesting Agents Required)

Requesting Agents: President, \_\_\_\_\_ Alumni Chapter/Club  
Treasurer, \_\_\_\_\_ Alumni Chapter/Club

Approving Agent: Director, ULM Alumni Association

**APPROVED:**

\_\_\_\_\_  
President, \_\_\_\_\_ Alumni Chapter/Club

\_\_\_\_\_  
Susan M. Chappell, Executive Director  
ULM Foundation and Alumni Relations

\_\_\_\_\_  
Treasurer, \_\_\_\_\_ Alumni Chapter/Club

\_\_\_\_\_  
Date

\_\_\_\_\_  
Director ULM Alumni Association

# **POLICIES**

**Required Annually Policies**

- Memoriam of Understanding
- Annual Report
- Chapter Affiliation Agreement
- Financial Responsibility
- Confidentiality Agreement
- Conflict of Interest

# Memorandum of Understanding

ULM Alumni Association \_\_\_\_\_

Chapter/Club

The ULM Alumni Association chapter or club named above hereby applies for official recognition by the University of Louisiana Monroe Alumni Association. As a chapter/club representative, on behalf of the above named chapter/club, agree to carry out the Alumni Association mission in the following ways:

- Be aligned with the Alumni Association purpose, vision and mission.
- Engage in proper use of official ULM and Alumni Association branding in all communication.
- Provide programming for diverse interests and age groups, and ensure that the name of the Chapter/Club is not limiting and/or perceived to be discriminatory based on sex, race, color, creed, national origin, and physical or mental disability.
- Ensure that membership is open to all alumni who are interested in the purpose of the Chapter/Club and no one is denied membership based on sex, race, color, creed, national origin, and physical or mental disability.
- Ensure the Chapter/Club will not be used for any political purpose.
- Ensure that members of the Chapter/Club are active members of the ULM Alumni Association.
- Prepare and timely submit an Annual Report to the ULM Alumni Association office.
- Use Alumni Association resources for communication with ULM alumni who live in our chapter/club's area; encourage alumni to keep their data current by updating their information on the Alumni Association website.
- Understand that the ULM Alumni Association, acting through its Board of Directors:
  - Reserves the right to remove a chapter/club officer should it be determined by the board that said officer is not complying with the obligations and duties set forth by the ULM Alumni Association.
  - Reserves the right to suspend a chapter/club's affiliation if it is determined that said chapter/club is not in compliance with the directives of the ULM Alumni Association.
- Understand that the chapter/club must comply with any and all records requests of the ULM Alumni Association, including but not limited to financial records, minutes from meetings and membership rolls.
- Understand that, as an affiliate of the ULM Alumni Association and University of Louisiana Monroe, our chapter/club is held to the University policies not limited to but including, Identity Standards, Social Media, Cash Handling, etc.
- Understand that, as a separate entity from the University of Louisiana Monroe, our chapter/club holds full legal and taxable liability for finances, events, or functions.

Attach the following documents with this Memorandum of Understanding:

- List of chapter or club leaders for the current year, including full name, leadership position, email, phone and address contact information
- Annual report

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

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

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Printed name, Chapter/Club President

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Signature

Date

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

RETURN COMPLETED FORM TO: ULM Alumni Association at  
alumniassociation@ulm.edu or print, complete and mail to 4400 Bon Aire Drive,  
Monroe, LA 71203.

FOR ALUMNI ASSOCIATION USE ONLY

Recognition approved by: Name: \_\_\_\_\_ Date: \_\_\_\_\_



# Annual Report

(To be submitted no later than August 1)

ULM Alumni Association \_\_\_\_\_ Chapter/Club

Officers of the chapter/club (including physical addresses) are: \_\_\_\_\_

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The Chapter/Club's Goal is: \_\_\_\_\_

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The chapter/club held the following activities within this reporting period: \_\_\_\_\_

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The chapter/club has \_\_\_\_\_ of active members. (Will receive from AA Staff)

\_\_\_\_\_  
Printed name, Chapter/Club President

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

# Chapter/Club Affiliation Agreement

Proposed Chapter Name: \_\_\_\_\_

Domicile:

\_\_\_\_\_  
(City or Town) (State) (Zip Code)

Chapter Area/Constituency shall be confined to (if applicable): \_\_\_\_\_

**WE, THE UNDERSIGNED, AS DULY ELECTED OFFICERS AND ACTING IN BEHALF OF THE MEMBERSHIP, HEREBY PETITION THE BOARD OF DIRECTORS OF THE UNIVERSITY OF LOUISIANA MONROE ALUMNI ASSOCIATION TO GRANT US FULL AFFILIATION AS A CHAPTER/CLUB OF SAID ASSOCIATION, WITH ALL THE RIGHTS AND PRIVILEGES APPENDING THERETO, AS PRESCRIBED IN THE CONSTITUTION OF THE ASSOCIATION AND AS CONTAINED IN RULES AND REGULATIONS AS MAY FROM TIME TO TIME BE PRESCRIBED BY THE BOARD OF DIRECTORS OF THE ASSOCIATION. WE FULLY AGREE TO GOVERN OUR ACTIONS REGARDING THE AFFAIRS OF THIS CHAPTER BY THE CONSTITUTION/BY-LAWS/RULES OF THE UNIVERSITY OF LOUISIANA MONROE ALUMNI ASSOCIATION AND BY ANY RULE OR REGULATION AS MAY FROM TIME TO TIME BE PRESCRIBED BY THE BOARD OF DIRECTORS OF SAID ASSOCIATION.**

**NOW, THEREFORE, RESPECTFULLY REQUESTED THIS \_\_\_\_\_ DAY OF \_\_\_\_\_ IN THE YEAR \_\_\_\_\_.**

\_\_\_\_\_  
**PRESIDENT**

\_\_\_\_\_  
**VICE-PRESIDENT (or Petitioner #2)**

\_\_\_\_\_  
**SECRETARY (or Petitioner #3)**

\_\_\_\_\_  
**TREASURER (or Petitioner #4)**

\_\_\_\_\_  
**Petitioner #5**

\_\_\_\_\_  
**Petitioner #6**

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ACCEPTANCE

The Board of Directors of the University of Louisiana Monroe Alumni Association  
approves and accepts the above organization to be affiliated with this Association as the  
\_\_\_\_\_ Chapter.

\_\_\_\_\_  
DATE

\_\_\_\_\_  
ALUMNI ASSOCIATION PRESIDENT

\_\_\_\_\_  
Secretary/Parliamentarian

# Confidentiality Policy

The ULM Alumni Association employees, board members, independent contractors, and vendors may not disclose, divulge, or make accessible confidential information belonging to or obtained through their affiliation with the ULM Alumni Association, including relatives, friends, and business and professional associates, other than to persons who have been approved as set forth below or by the alumni director. The University of Louisiana Monroe Alumni Association maintains information to facilitate university business while upholding the trust and confidence of alumni and donors. The use of information maintained by the University of Louisiana Monroe Alumni Association is restricted to official university business, and no information is released for commercial, political or religious purposes.

Alumni Association employees, board members, independent contractors, and vendors must exercise good judgment and care at all times to avoid unauthorized or improper disclosures of confidential information. Conversations in public places should be limited to matters that do not pertain to information of a sensitive or confidential nature. In addition, confidential information should not be left in plain view or be communicated by speaker phone. The duties under this Confidentiality Policy shall extend and remain in existence following the termination of the employees', board members', independent contractors', and vendors' affiliation with the Alumni Association.

## Alumni Information

This information is confidential. All information, regardless of the form in which it is released, is subject to the rules and regulations regarding confidentiality. General alumni information (name, phone number) is released only to chapter/club officers and their committee members for the purpose of an approved chapter/club event. It is understood that, in releasing this information to chapter/club volunteers, the intent is to use it only for the sole benefit of ULM and the chapter/club function to be held in each approved chapter/club area. No part of this information can be reproduced or transmitted in any form without the express written consent of the Director of Alumni Affairs for ULM. It is our policy to NEVER share data files containing confidential personal information with anyone outside the ULM Foundation, ULM Alumni Association, ULM Athletic Foundation or their contracted service providers. All request for list must be approved by the Director of Alumni Affairs.

- Before sharing any data files that include alumni or alumni personal confidential information, the director will need to understand the purpose of the data, who is requesting it, and how it is to be used.
- The director will never email data files with confidential personal information.
- The Alumni Association will be responsible for sending emails on behalf of chapters/clubs that are requesting emails to be sent to our alumni database.
- To request an email be sent to a targeted group of alumni please complete the targeted email request form along with any specific graphics requested to be included.
- The Alumni Association Office will work with OMC to obtain approval on all communications and printed materials as required per University guidelines.

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Name

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Date

# Conflicts of Interest

## ***Policy***

We have an obligation to conduct business within guidelines that prohibit actual or potential conflicts of interest. The purpose of these guidelines is to provide general direction. An actual or potential conflict of interest occurs when a chapter president is in a position to influence a decision that may result in a personal gain for that chapter president or for a relative as a result of the ULM Alumni Association's business dealings.

## ***Procedures***

Any matter which comes before the Alumni Association Board of Directors in such a way as to give rise to conflict shall be concluded in accord with procedures specified in the ULM Alumni Association Bylaws. Minutes of meetings will reflect discussion of, and voting on such matters.

Each interested person will sign a Conflict of Interest Disclosure Statement. Chapter and Club Presidents will be asked to sign statements annually.

The Conflict of Interest Disclosure Statements shall be presented to the Director of the ULM Alumni Association for purposes of review. Should there be an appearance of conflict of interest, necessary actions to avoid such conflict and/or make disclosure to appropriate parties shall be recommended.

The file on all Conflict of Interest Disclosure Statements will be maintained in the office of the Director of the ULM Alumni Association.

## ***Disclosure Statement***

The following will serve as a guide to the types of activities that might cause conflicts and that should be fully disclosed. Full disclosure of any situation in doubt should be made so as to permit an impartial and objective determination. It should be particularly noted that disclosure relates not only to yourself but also to your immediate family.

### **1. OUTSIDE INTEREST**

To hold, directly or indirectly, a position or a material financial interest in any outside concern from which the individual has reason to believe the ULM Alumni Association secures goods or services, or that provides services competitive with the ULM Alumni Association. For the purposes hereof, the term "material financial interest" shall not apply to any interest in a concern constituting less than 1% of the controlling interests of said concern.

To compete, directly or indirectly, with the ULM Alumni Association in the purchase or sale of property or property rights, interests, or services.

### **2. OUTSIDE ACTIVITIES**

To render directive, managerial, or consultative services to any outside concern that does business with, or competes with the services of the ULM Alumni Association, or render other services in competition with the ULM Alumni Association.

### **3. GIFTS, GRATUITIES, AND ENTERTAINMENT**

To accept gifts, excessive entertainment, or other favors from any outside concern that does, or is seeking to do, business with, or is a competitor of the ULM Alumni Association under circumstances from which it might be inferred that such action was intended to influence or possibly would influence the individual in the performance of

his/her duties. This does not include the acceptance of items of nominal or minor value (\$100 or less) that are clearly tokens of respect or friendship and not related to any particular transaction or activity of the ULM Alumni Association.

4. **INSIDE INFORMATION**

To disclose or discuss with anyone other than members of the ULM Alumni Association Board or its executive officers any information relative to the business or affairs of the ULM Alumni Association.

I hereby attest that I have read and agree to abide by the ULM Alumni Association Conflict of Interest Policy and have listed below any disclosure information required by this policy. (If none, so indicate)

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\_\_\_\_\_  
Name

\_\_\_\_\_  
Date

## **Non-Discrimination Policy**

The University of Louisiana at Monroe recognizes that members of the University community represent different groups according to sex, race, color, creed, national origin, and physical or mental disability. The University further recognizes that, in a pluralistic society such as ours, these differences must be recognized and respected by all who intend to be a part of the University community.

It is not the intent of the University to dictate feelings or to mandate how individuals should personally interact with others. It is, however, the intent of the University that awareness of individual and group rights according to sex, race, color, creed, national origin, and physical or mental disability be regarded as important to the education of its students. Our ability to work in a pluralistic society demands no less.

It is with this in mind that the University does not permit any actions, including verbal or written statements that discriminate against an individual or group on the basis of sex, race, color, creed, national origin, or physical or mental disability. Complaints of discrimination should be made orally and in writing to the Executive Director of the ULM Foundation and Alumni Relations.

# Forms

## Table of Contents:

### Miscellaneous Forms

- [Email Request](#)
- [Event Application](#)
- [Fund Request](#)

## FAQ CHART

