## Contents

Letter from the Associate Vice Chancellor of Alumni Affairs .................. 7

Vision and Mission of the UT Knoxville Alumni Association .................. 8

Finding Your Place in the Strategic Plan ................................................. 10

- **CHAPTER DIRECTORS** ................................................................. 10
- **CHAPTER STAFF** ........................................................................ 11

The Alumni Chapters Program Overview ............................................ 12

- Purpose of an Alumni Chapter ...................................................... 12
- Chapter Names ............................................................................. 12
- Chapter Governance .................................................................... 12

ALUMNI BOARD OF DIRECTORS CONSTITUTION AND BYLAWS ........ 13

- Endorsed Chapters and Councils .................................................. 13

LEADERSHIP, STRUCTURE, AND ORGANIZATION ............................. 14

- President .................................................................................... 14
- President-Elect ......................................................................... 14
- Secretary .................................................................................. 14
- Treasurer .................................................................................. 15
- Philanthropy Chair ................................................................... 15
- Marketing/Social Media Chair .................................................. 15
- Career Development Chair ...................................................... 15

CHAPTER BOARD ROLES AND RESPONSIBILITIES ............................. 15

- Roles and Responsibilities for All Board Members ....................... 15

ELECTIONS AND TERMS .................................................................. 16

- Board Member Nomination and Selection ................................... 16
- Officers and Term Limits ............................................................. 17

CHAPTER BOARD MEMBER REMOVAL .......................................... 18

BOARD MEETINGS ......................................................................... 18

- Sample Chapter Board Meeting Agenda ..................................... 19
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUCCESSION PLANNING</td>
<td>19</td>
</tr>
<tr>
<td>CHAPTER PROGRAMMING AND AWARDS</td>
<td>20</td>
</tr>
<tr>
<td>Programming Guidelines</td>
<td>20</td>
</tr>
<tr>
<td>Event Tools</td>
<td>20</td>
</tr>
<tr>
<td>PROGRAM EVALUATION</td>
<td>20</td>
</tr>
<tr>
<td>Contracts Overview</td>
<td>21</td>
</tr>
<tr>
<td>CONTRACT SCENARIOS</td>
<td>21</td>
</tr>
<tr>
<td>CONTRACT PROCESS REQUIREMENTS</td>
<td>21</td>
</tr>
<tr>
<td>Alcohol Policy</td>
<td>22</td>
</tr>
<tr>
<td>Event Planning Timeline</td>
<td>23</td>
</tr>
<tr>
<td>TWELVE WEEKS OUT</td>
<td>23</td>
</tr>
<tr>
<td>EIGHT WEEKS OUT</td>
<td>23</td>
</tr>
<tr>
<td>SIX WEEKS OUT</td>
<td>24</td>
</tr>
<tr>
<td>FOUR WEEKS OUT</td>
<td>24</td>
</tr>
<tr>
<td>TWO WEEKS OUT</td>
<td>24</td>
</tr>
<tr>
<td>WEEK OF EVENT</td>
<td>24</td>
</tr>
<tr>
<td>DAY OF THE EVENT</td>
<td>24</td>
</tr>
<tr>
<td>AFTER THE EVENT</td>
<td>25</td>
</tr>
<tr>
<td>Chapter Charitable Activities</td>
<td>25</td>
</tr>
<tr>
<td>Considering Special Events as a Fundraiser</td>
<td>26</td>
</tr>
<tr>
<td>Event Sponsorships—Be Careful!</td>
<td>27</td>
</tr>
<tr>
<td>Marketing</td>
<td>27</td>
</tr>
<tr>
<td>ALUMNI LOGOS</td>
<td>27</td>
</tr>
<tr>
<td>HOW WE CAN HELP</td>
<td>28</td>
</tr>
<tr>
<td>E-Mail Blasts</td>
<td>28</td>
</tr>
<tr>
<td>Event Calendar Posting on Website</td>
<td>29</td>
</tr>
<tr>
<td>Online Registration for Events</td>
<td>29</td>
</tr>
<tr>
<td>SOCIAL MEDIA FOR CHAPTERS</td>
<td>.........................................................................................29</td>
</tr>
<tr>
<td>Why social media?</td>
<td>.........................................................................................29</td>
</tr>
<tr>
<td>General Guidelines</td>
<td>.........................................................................................30</td>
</tr>
<tr>
<td>How to Find Good Content</td>
<td>.........................................................................................30</td>
</tr>
<tr>
<td>Sample Social Media Updates</td>
<td>.........................................................................................31</td>
</tr>
</tbody>
</table>

| Serving as a Representative of the University | .........................................................................................32 |

| Chapter Awards | .........................................................................................32 |
| AWARDS PROGRAMS | .........................................................................................32 |
| Volunteer Leadership Weekend and the Big Orange Awards Bash | .........................................................................................32 |

| Chapter Scholarship Program | .........................................................................................32 |
| TYPES OF SCHOLARSHIPS | .........................................................................................33 |
| ESTABLISHING A CHAPTER SCHOLARSHIP | .........................................................................................33 |
| Ways to Fundraise | .........................................................................................34 |
| Collecting Contributions | .........................................................................................34 |
| Timeline | .........................................................................................35 |
| Selection Process | .........................................................................................35 |
| Chapter Recommendations | .........................................................................................35 |

| Alumni Student Recruitment Efforts | .........................................................................................36 |
| Roles and Responsibilities of the Alumni Student Recruitment Volunteer | .........................................................................................36 |

| OVERVIEW OF RECRUITMENT OPPORTUNITIES | .........................................................................................37 |
| Future Vols | .........................................................................................37 |
| Letter Writing | .........................................................................................37 |
| Scholarship Presentations | .........................................................................................37 |
| Rocky Top Tailgate | .........................................................................................37 |
| New Vol Roll Call | .........................................................................................37 |
| Summer Send-Offs | .........................................................................................38 |
| College Fairs | .........................................................................................38 |

<p>| GETTING INVOLVED | .........................................................................................38 |</p>
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>University Policies</td>
<td>38</td>
</tr>
<tr>
<td>CHAPTER LEADER LIABILITY</td>
<td>38</td>
</tr>
<tr>
<td>FINANCIALS</td>
<td>39</td>
</tr>
<tr>
<td>TAX IDENTIFICATION</td>
<td>39</td>
</tr>
<tr>
<td>NCAA COMPLIANCE</td>
<td>40</td>
</tr>
<tr>
<td>DATA CONFIDENTIALITY</td>
<td>40</td>
</tr>
<tr>
<td>DATA MANAGEMENT</td>
<td>40</td>
</tr>
<tr>
<td>LOGOS</td>
<td>41</td>
</tr>
<tr>
<td>CODE OF CONDUCT</td>
<td>41</td>
</tr>
<tr>
<td>Attachment A</td>
<td>43</td>
</tr>
<tr>
<td>BOARD MEMBER CODE OF CONDUCT</td>
<td>44</td>
</tr>
<tr>
<td>Attachment B</td>
<td>47</td>
</tr>
<tr>
<td>SAMPLE CHAPTER BOARD MEETING AGENDA</td>
<td>48</td>
</tr>
<tr>
<td>Attachment C</td>
<td>49</td>
</tr>
<tr>
<td>CHAPTER EVENT EVALUATION FORM</td>
<td>50</td>
</tr>
</tbody>
</table>
Dear Chapter Leader:

One of the best parts of my job is seeing our loyal alumni serve as change agents to influence the university’s future. We rely on the deep commitment of the Volunteer community to move the needle, and our chapters are helping us do just that.

It’s an exciting time to be an alumnus of the University of Tennessee, Knoxville. As we work to join the ranks of the nation’s Top 25 public research universities, we look to our chapters—the foundation of our vast alumni network—to help strengthen, enhance, and sustain connections to our campus. As a chapter leader, you play a vital role in cultivating lifelong connections to UT.

To help in these efforts, we’ve put together this manual to guide you through your role as a chapter leader. Please share this information with your fellow officers and board members so that you can work together to achieve your chapter’s goals.

Thank you again for what you do for UT. You make our work possible—and rewarding.

Leland D. Patouillet, PhD
Associate Vice Chancellor of Alumni Affairs
Vision
Our vision is to be a key leader in the university’s journey to become a Top 25 public research university by serving students and alumni and by cultivating a strong culture of lifelong connection and philanthropy.

Strategic Directions

Improve Data Integrity
Enhancing the quality of UT’s database is essential to engaging more of the Big Orange family in the life of the university.

Enhance UT’s Reputation
Helping build UT’s brand by communicating a consistent message and utilizing volunteers to share university accomplishments is key to building the university’s reputation.

Strengthen Student Engagement
Creating the next generation of alumni leaders by involving students in alumni and development initiatives is critical to the university’s future.

Amplify Alumni Engagement
Creating more volunteer and involvement opportunities for alumni is a major strategy to advance the university’s goals.

Increase the Number of Alumni Donors
Generating 10,000 new donors by 2020 is a key driver in the university’s journey to Top 25 status.

Enhance Donor Stewardship
Establishing stewardship as a priority is part of the alumni program’s commitment to accountability and transparency.
**Mission**
The University of Tennessee Alumni Program will advance the university and enrich the lives of students and alumni.

**Values**

**Excellence**
We go the extra mile. We deliver high-quality communications, programs, and service.

**Innovation**
We strive to be an industry leader. Our success depends on continuous improvement, adaptability, and embracing transformational change.

**Traditions**
We believe in Tennessee. We cherish the university’s rich and vibrant history and enhance its reputation.

**Inclusion**
We value diversity. We welcome all, recognize and value differences, and seek alternative perspectives and inclusiveness in all we do.

**Accountability**
We keep our promises. Our reputation rests on transparency, professional ethics, honesty, and fairness.

**Partnerships**
We promote collaboration. We develop strategic alliances and use university resources efficiently and effectively.
Finding Your Place in the Strategic Plan

Chapters are critically important to the future of UT. To help guide your chapter programming, we have designed a resource called Services to UT Knoxville, which lays out suggested events that will make the largest impact. Using the document ensures chapter programming will directly contribute to the alumni office’s mission and goals. You can access the resource on the “Leaders Toolkit” page at alumni.utk.edu/chapters.

CHAPTER DIRECTORS

Each chapter is provided an alumni staff representative, known as a chapter director, to work with you by providing guidance and direction in governing your chapter. Your chapter director works with you to ensure that you are following UT policies and procedures and to help you avoid potholes, work up the big hills, and celebrate your successes. More than that, your chapter director is a resource equipped with knowledge of alumni affairs, volunteer management, and university policies. They are not, however, there to do the job for you.

The chapter director is your gateway to the university. All questions that pertain to the chapter should be discussed with your chapter director. Requesting speakers, group tickets, or any other question you may have should be directed to the chapter director. They are there to help you!

What are some of the specific things that a chapter director does for a chapter?

• Handles request for speakers, travel arrangements, and briefings for university speakers
• Helps educate a chapter president and board about the policies and procedures applicable to a chapter
• Allows a chapter to be within “institutional control” of the university within the guidelines of the NCAA
• Provides guidance and support for challenging situations that chapters face as a result of their roles in their communities
• Serves as a sounding board for ideas, activities, and events, providing feedback on how the chapter can best serve the university
• Serves as a resource to chapter leaders for information about the university
CHAPTER STAFF

John Young, Director of Alumni Chapters
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John earned a bachelor’s degree in English from UT in 2009. He overseas communications for the alumni chapter program and serves as staff liaison to chapters in multiple regions across the country, working with them to implement programs and events.

Susie Orr, Director of Alumni Programs
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A 1974 graduate of the Haslam College of Business, Susie has been with the Office of Development and Alumni Affairs for her entire career. She is responsible for the Big Orange Tailgate Tour and UT Homecoming events as well as assisting several alumni chapters across the country.

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Taylor received a bachelor’s degree in philosophy of science & medicine at UT in 2013 and is pursuing his master’s in college student personnel. He worked in UT Admissions before joining the alumni office, where his current focus is promoting recruitment and chapter scholarships.

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Kristin earned a bachelor’s degree in public relations from UT in 2013. She oversees the chapter program’s email communications and assists several alumni chapters with their local programming.

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Ellie, who received a bachelor’s degree in psychology from Rutgers, joined the alumni office in December 2016. She provides administrative support for the UT Knoxville chapter program as well as for alumni student recruitment and scholarships efforts.
The Alumni Chapters Program Overview

The Alumni Chapters Program represents UT in communities around the country. This manual will provide practical information for chapter leaders as you guide your local chapter. Throughout this manual, you will find descriptions of the key elements of the program, helpful information to grow and sustain a chapter, and ideas for fulfilling your “Services to UT,” as defined below.

Services define tangible ways in which a chapter can direct its activities to be successful and support the institution.

The Alumni Chapter Engagement Awards lay out criteria by which each chapter is evaluated according to set objectives based on these services. The purpose of the evaluation system is to assist the Office of Alumni Affairs in developing stronger local chapters and a stronger overall chapter program.

While this manual strives to answer many of your questions, please know that your chapter director is available to provide support to help you along the way.

Purpose of an Alumni Chapter

Alumni chapters exist to encourage the organized efforts of alumni to be more knowledgeable and actively supportive of UT. Chapters allow the university to engage alumni in their local communities.

Specifically, alumni chapters:

• Coordinate all organized UT alumni activity in that geographical area;
• Share current information with their local community about UT’s academic programs, scholarship opportunities, and achievements;
• Provide scholarship funds for deserving local students who are attending the university; and
• Encourage philanthropic giving to UT.

Chapter Names

The naming convention for alumni chapters is town, county, or region name + UT Knoxville Alumni Chapter. This is the formal name that each chapter will bear. Groups can adopt short name references as appropriate such as town, county, or region name + Alumni Chapter.

For example:

• Cincinnati UT Knoxville Alumni Chapter
  Short name: Cincinnati Alumni Chapter
• Dallas/Fort Worth UT Knoxville Alumni Chapter
  Short name: Dallas/Fort Worth Alumni Chapter

Chapter Governance

All chapter oversight is provided by the Office of Alumni Affairs and the Alumni Board of Directors. Article eight, as listed in the Alumni Board of Directors Constitution and Bylaws, provides all governance and oversight for the program.
ALUMNI BOARD OF DIRECTORS
CONSTITUTION AND BYLAWS

Article Eight: Alumni Constituent Organizations—Alumni Chapters and Special Interest/Diversity Councils.

Alumni of the University of Tennessee, Knoxville, can be organized into constituent organizations based on geographic location and/or special interest/diversity affiliation. The work of any alumni constituent organization should be focused on advancing the mission and strategic plan of the UT Knoxville Alumni Program.

(a) Alumni of the University of Tennessee, Knoxville, can organize into regional or geographic-based chapters within the state of Tennessee, in select out-of-state markets and targeted cities throughout the globe. The UT Knoxville Alumni Office provides staff support for the chapters.

(b) Alumni of the University of Tennessee, Knoxville, can organize by Special-Interest/Diversity Councils. The UT Knoxville Alumni Affairs Office provides staff support for the councils.

Endorsed Chapters and Councils
(a) Each chapter and council will elect a president and other such officers and directors as the membership may deem necessary.

(b) Chapters and councils may call meetings, set up objectives and a program of activities, make studies of local alumni and university needs, and make program recommendations thereon to the UT Knoxville Alumni Affairs staff.

(c) Chapters may set budgets providing for the operation of their local chapters, but overall UT fundraising activities involving the chapters will be operated through the UT Knoxville Office of Alumni Affairs and Annual Giving. Each chapter shall submit an annual financial statement and yearly summary of activity to the UT Knoxville Office of Alumni Affairs.

(d) Each council shall submit a yearly summary of activity to the UT Knoxville Office of Alumni Affairs.

(e) Chapters and councils may not charge membership dues.

(f) Each chapter and council shall comply with all applicable laws and National Collegiate Athletic Association (NCAA) rules.

(g) No action, report, resolution, or recommendation of any chapter or council shall be published or presented as any action or position of the UT Office of Alumni Affairs or Board of Directors unless approved in advance by the UT Office of Alumni Affairs.
LEADERSHIP, STRUCTURE, AND ORGANIZATION

Examples of Leadership Roles and Responsibilities (may be adapted to suit the needs of the chapter):

**President**
The president will preside at all meetings of the chapter and shall be chairman of the board and ex-officio member of every committee. Following the term as president, he or she will serve as past president of the chapter to smooth the transition for the newly installed president. The president of the chapter to smooth the transition for the newly installed president. He or she should attend all chapter functions, be a primary representative within the community, lead the chapter to a successful year, submit awards applications at the end of the year, and attend leadership training when available.

**President-Elect**
The president-elect shall work closely with the president and shall perform certain duties of the president at his/her request or in his/her absence. The president-elect shall be an ex-officio member of every committee. The president-elect will serve for one year and will automatically serve as president the next year.

**Secretary**
The secretary shall keep minutes of all meetings of the chapter and
the board, arrange for notices of all meetings, forward a complete guest list from events and a report of all meetings to the chapter director. The secretary serves a one-year term.

**Treasurer**

The treasurer shall supervise all receipts and expenditures and shall be in charge of financial arrangements for all meetings, programs, and events. He or she shall be an ex-officio member of all committees. Annually, the treasurer must provide a detailed financial report to the alumni office outlining the income and expenses incurred by the chapter.

**Philanthropy Chair**

The philanthropy chair shall develop an annual fundraising strategy, including Big Orange Give and funding needs for chapter scholarships.

Depending on local circumstances, a larger chapter may want to consider these additional positions:

**Marketing/Social Media Chair**

The marketing/social media chair shall coordinate content for the chapter’s internal and external communications, including social media. He or she shall try to secure pictures during major chapter activities.

**Career Development Chair**

The career development chair keeps issues related to career networking and support on the agenda for the chapter. Working with the Office of Alumni Affairs career liaison, this position helps provide information to chapter members about the professional career directory, career guide opportunities, and more.

**CHAPTER BOARD ROLES AND RESPONSIBILITIES**

An alumni chapter board of directors should be a dynamic group of people from many different sectors of the community with diverse cultural backgrounds and professional achievements with a passion for the University of Tennessee. Alumni chapter board members are expected to work together throughout the year to provide programs that connect alumni to one another and back to the university. Programming should fall in line with the alumni office’s strategic plan.

**Roles and Responsibilities for All Board Members:**

- Participate in various planning committees that carry out the programming provided by the chapter.
- Work at events and activities hosted and presented by the chapter.
- Support events by promoting events and programs sponsored by the chapter.
- Attend board meetings held periodically throughout the year.
- Make a yearly financial contribution of any amount to the university.
- Communicate regularly with your chapter board. This may include in-person meetings or conference calls.
• Serve as a local resource for current and incoming students as well as alumni that are new to the area.

• Promptly respond to inquiries about your alumni community from fellow alumni or university staff.

• Where possible, maintain a social media presence on platforms such as Twitter, Facebook, or Instagram.

• Take pictures during events and submit them to your chapter director.

• Communicate with your chapter director regularly so we can best serve the alumni population in your area.

• Keep track of attendance at events. Share the names and contact information of attendees.

• Keep all alumni contact information gathered confidential and used for alumni purposes only.

• Announcements or other communications made for personal, commercial, or political gain are strictly prohibited.

• Adhere to trademark usage guidelines in all permitted uses of the university’s name, logo, and other trademarks.

• Comply with policies and requests from the Office of Alumni Affairs.

• Support the mission through actions of the chapter program and UT.

• Represent the university in a positive light at all times.

• Adhere to the alumni office’s Chapter Board Code of Conduct.

If members of a chapter’s board of directors are not fulfilling their roles and responsibilities or any additional duties as assigned, please consult your chapter director as to how to proceed in the best interest of your chapter.

ELECTIONS AND TERMS

Board Member Nomination and Selection:

1. Soliciting applications for new board members must be an opportunity provided to all alumni located in the area. For in-state chapters and the Atlanta region, the Office of Alumni Affairs will send an
e-mail to all alumni in each area during the month of October to solicit applications. For out-of-state chapters, boards are encouraged to provide a similar opportunity by soliciting local alumni. The Office of Alumni Affairs can also assist in this process.

2. Board members are to be selected based on their merit and qualifications in a fair and nondiscriminatory manner, based on the current UT nondiscrimination policy.

3. The selection committee should ensure that new board members represent diverse backgrounds, ages, and occupations.

4. Board members shall serve a three-year term, which is effective January 1 and will cease on December 31. Each alumnus/alumna is limited to serving only two terms. Consecutive terms are allowed, but board members running for re-election must contact the nominating committee prior to the completion of their first term to be considered on the slate of candidates for an additional term.

5. Beginning calendar year 2017, the president of the alumni chapter must be a graduate of the University of Tennessee, Knoxville, in accordance with the UT Knoxville’s definition of an alumnus. However, nonalumni are welcome to serve on the board in other roles.

6. The board will elect three current members who are not active applicants to serve on the selection committee.

7. The selection committee may conduct phone interviews or host a meeting to get to know applicants.

8. The selection committee will provide a slate by e-mail to the current chapter board one week prior to the board meeting at which the slate is voted upon.

9. A meeting of the alumni population in the region does not need to occur in order to vote on new members or to announce new members. The board is to handle all business of the chapter within board meetings.

Officers and Term Limits:

1. The only position for which automatic succession occurs is president-elect to president. All other officer positions do not automatically move into another position in succession.

2. Each officer position is a one-year commitment. An officer can apply for another term for a maximum of two terms.

3. All board members should be given the opportunity to apply for an officer position by sending an e-mail to the president of the board.

4. If more than one candidate
exists for a position, the board will vote by anonymous ballot at the last board meeting of the year. Board members must be notified one week in advance that they will be voting on officers.

5. The nominating committee will provide the board with the slate of officers based on the applications received for approval. The majority of board members present must approve the slate.

CHAPTER BOARD MEMBER REMOVAL

A board member can be removed under the following circumstances:

1. Board members are reviewed annually for their active contribution and involvement as a member of the chapter leadership. An active board member will attend at least two thirds of the board meetings and will be actively involved in planning and attending chapter events. Board members may be removed when not actively serving the board.

2. Board members must adhere to the Office of Alumni Affairs’ Code of Conduct (see attachment A). If the board member takes actions or behaves in violation of this code, the alumni office or the chapter board can take action to remove the board member from their chapter board position.

3. If a chapter is seeking to remove a board member they must first contact their chapter director to be granted approval to proceed.

4. Once approval is received, the board will vote at their next meeting and a minimum of two thirds must vote “yes” for removal.

5. The Office of Alumni Affairs can remove a board member without a vote if that board member is in violation of the Code of Conduct.

BOARD MEETINGS

Based on the size, scope, and number of activities that a chapter coordinates, chapter boards should meet on a regular basis. Frequency of meetings should be determined by the group with the assistance of the chapter director. As a guide, many chapters meet monthly or every six weeks, conducting other business by e-mail between meetings. When feasible, the chapter director will also be in attendance.

Below are tips for productive, efficient board meetings.

1. Schedule your meetings well in advance. It is helpful to develop an annual calendar for your meetings and events so that people can plan ahead. It is also a good idea to have a regularly scheduled meeting time (e.g., the second Thursday of each month) so board members can anticipate when the meeting will be held.
2. Distribute an agenda a few days before the meeting.

3. Communicate the importance of everyone attending the meetings.

4. Try to limit meetings to one hour and start and end the meeting on time.

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. Ask participants to notify you ahead of time with any items that need to be included on the agenda.

7. See that all members have a chance to participate.

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

9. Be sure that minutes are distributed in a timely fashion following the meeting. Copy your chapter director on the minutes that are sent out.

Sample Chapter Board Meeting Agenda

See Attachment B for a sample meeting agenda.

SUCCESSION PLANNING

One of the biggest qualities of a successful chapter is stable, effective leadership and a succession plan that allows for a seamless transition of officers should one be necessary.

This plan should exist for key leadership positions, particularly for the president/president-elect—this allows for new ideas in the chapter and prevents burnout and one-man band syndrome, where one person is functioning as the entire board.

By having a succession plan for key leadership positions, the chapter will be prepared to respond to unexpected or sudden vacancies.

Chapter leaders should engage continually in succession planning by identifying, training, and motivating new leaders. Below are ways that chapters can recruit new board members:

• Utilize open house events and open board meetings to identify potential leaders.

• Send out an interest survey to local alumni via the Office of Alumni Affairs.

• Conduct yearly leadership retreats and encourage your board to take advantage of UT resources to train new leader—resources include
the Chapter Leaders Workshop, volunteer Leadership Weekend, webinars, and more.

- Motivate new leaders by assigning them responsibilities applicable to their positions. In the beginning, have experienced board members shadow or codirect events to provide guidance.

CHAPTER PROGRAMMING AND AWARDS

Programming Guidelines
Chapters are responsible for advancing the university through engaging alumni programming. A concerted effort should be made to plan events that attract all segments of your chapter’s constituency, including young alumni, older alumni, and alumni with children. Programs may include admissions-related events, university speakers, cultural activities, career development activities, and more.

The Service to UT Knoxville document can be used to guide alumni chapters in serving the university, current and prospective students, and alumni. This document can be found under the “Leaders Toolkit” page on alumni.utk.edu/chapters. All events should fall into these categories to maximize impact for the university, and programming should include a university message.

Event Tools
The Office of Alumni Affairs can, when available, provide the chapter with university promotional tools for your event such as bookmarks, stickers, and brochures. Please work with your chapter director to request these items.

PROGRAM EVALUATION

A systematic approach to evaluating your activities and benefits can be helpful in the planning of future events. There are many ways to accomplish this, including evaluations of individual events. We encourage you to develop benchmarks to maintain continuous quality improvement. Chapters can use the Chapter Event Evaluation Form (Attachment C) to debrief after an event and evaluate its success. Remember, the ultimate goal of each event is to advance the university and enrich the lives of students and alumni.
Contracts Overview

A number of chapters are presented contracts when planning programs and events. A contract is any agreement that you, as a chapter, enter into to engage the services provided by a vendor. Under University of Tennessee Foundation Inc. (UTFI) policy, ALL CONTRACTS must be signed by an authorized signor of UTFI and NOT by chapter leaders. In summary, if a signature is required for ANY reason, for any sort of agreement, send the document to your chapter director.

One of the key reasons for this policy is to ensure that our alumni leaders are covered by UTFI policy. This policy is set to protect UTFI, the Office of Alumni Affairs, and all of its chapters and councils.

The policy is for your protection as a chapter leader. It allows leaders and chapters to have counsel when being sued in regards to an event or function the chapter is hosting. The signor/contracting party on a contract is legally bound by its terms. UTFI is the contracting party when the contract is signed by an authorized signor. Chapters leaders are not authorized signors and a contract signed by a chapter leader would not be covered under UTFI.

Failing to honor a contract is called a “breach.” In the event of a breach of contract, courts can award money damages or force you to abide by the contract’s terms. You, personally, do not want the full responsibility by signing the contract. UTFI signing all contracts for chapters will help ensure that, if a breach occurs, the chapters will be covered through the foundation.

If you have questions about this policy, please contact your chapter director.

**CONTRACT SCENARIOS**

1. The vendor DOES NOT require a contract, and the purchase amount is less than $10,000. **NO CONTRACT APPROVAL NECESSARY**

2. The vendor DOES require a contract or signature, and the purchase amount is less than $10,000. **CONTRACT APPROVAL PROCESS MANDATORY**

3. The purchase amount is more than $10,000. Even if vendor does not require a contract, UTFI DOES require a contract for purchases of $10,000 or more. **BIDDING PROCESS MANDATORY*, CONTRACT APPROVAL PROCESS MANDATORY**

*Please contact your chapter director for any event that may exceed $10,000 prior to contacting vendors. Make sure to allow ample time to complete the bidding process, as it can take up to eight weeks to complete.

**CONTRACT PROCESS REQUIREMENTS**

Any contract your chapter obtains must be signed by an approved signor of UTFI and **not a chapter leader.**
The contract process is required for all contracts, no matter the amount.

If your vendor requires a contract/signature, or if your purchase is over $10,000 and UTFI requires a contract, the contract has to go through the approval process. If the contract is over $10,000, the expense must go through the bid process.

1. Do you need a contract? Look at the contract scenarios.

2. Once it is time to begin the contract process, please contact your chapter director for the necessary forms and information.

3. Provide your vendor with the necessary forms and the standard terms and conditions so that the contract complies with UTFI policy. Be sure to state in the vendor’s contract that, “UT Foundation Inc.’s standard terms and conditions are hereby incorporated into this agreement.”

4. Submit the contract and all paperwork to your chapter director. He/she will submit to the UTFI business office for review and signature. If no changes are necessary, then an authorized representative of the foundation will sign the contract, and it will be returned to the chapter and vendor.

5. The chapter will need to have the vendor sign the contract and then provide a scan of the signed contract to their chapter director. At this point, the contract is now fully executed.

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**Alcohol Policy**

The Office of Alumni Affairs recognizes that alcoholic beverages may be served at alumni chapter event from time to time. Such service is subject to the following policy:

1. **Alcoholic beverages may only be served:**
   
a. In a manner that is consistent with all local, state, and federal laws and regulations;

b. By a hired, qualified third-party alcohol server; and

c. As part of an event that includes food service and nonalcoholic beverage service.

2. **Alcoholic beverages may not be served:**
   
a. In a manner that promotes the service of the alcoholic beverages as “free” or “without cost” or “self-service” style or by any other uncontrolled means;

b. At programs designed to attract current or prospective students who may be under twenty-one years old;

c. To minors or anyone who is intoxicated; or

d. By any volunteer or staff person representing the Office of Alumni Affairs.
Event Planning Timeline

Plenty of advance notice is the key to success. For any event promotion, you must provide the information to the alumni office at least SIX WEEKS before your event. Well in advance, you must initiate and coordinate with the alumni office all events with a university component such as speakers or any venue that requires a contract. The alumni team is fast, experienced, and available to consult on chapter programming, best practices, and logistics.

TWELVE WEEKS OUT:

- Work with your chapter officers to answer some key questions:
  - What are the goals of the event?
  - How does this event fit in with the Services to UT Knoxville?
  - What do we want the event to look/feel like?
  - How much money can we spend on the event?
  - Who is going to be responsible for which aspects of planning?
  - How can we make sure the event will be a success?

- Research costs associated with your event and prepare your budget.

- Select date, venue, theme, and/or guest speaker(s) if applicable. Your chapter director should be the only person contacting potential university speakers.

- If a contract needs to be signed, send the contract to your chapter director for processing by the business office.

EIGHT WEEKS OUT:

- Create a social media marketing plan for the event.

- Begin work on design for any printed materials at the event (e.g. signage or a printed program).

- Design promotional materials such as T-shirts, koozies, stickers, magnets, buttons, caps, etc.
SIX WEEKS OUT:

- Fill out the Event Submission Form—your chapter director will receive this information and ensure it gets up on the website and that an e-mail is sent out to alumni in your area. Establish people responsible for different tasks on the day of the event, including but not limited to:
  o Greeting and signing in guests;
  o Making welcoming comments, explaining the chapter’s role;
  o General program moderator (e.g. introduction of speakers, etc.);
  o Audio/visual lead, setting up projector, background music, etc.;
  o Vendor on-site contact; and
  o Setup and cleanup crew.

- Targeted e-mail blast sent by the Office of Alumni Affairs.

- Begin social media campaign to promote the event.

FOUR WEEKS OUT:

- Order any printed materials, including T-shirts, koozies, caps, posters, signage, buttons, stickers, and programs.

TWO WEEKS OUT:

- Additional targeted e-mail reminder sent by the Office of Alumni Affairs.

- Reconfirm event details with the venue and finalize any logistics/questions.

- Reconfirm event details with any guest speakers or honorees.

WEEK OF EVENT:

- For any attendees registered through the Office of Alumni Affairs website, the office will send an event reminder and print nametags.

- If the chapter is handling registration, it should send a reminder e-mail and print nametags for attendees.

DAY OF THE EVENT:

- Arrive at the venue an hour before your event.

- Connect with the owner/manager of the venue to make sure that everything is set.

- Setup your check-in table.

- Put out decorations.

- Greet participants as they arrive and ask them to sign in.

- Make some sort of welcoming remarks, thank them for coming, etc.

- Conduct your event.

- Take photos of the action, layout, etc.
• Make closing remarks, thank attendees for coming, let them know about any upcoming chapter events.

• Give thank you notes to speakers, venues, etc.

• Make sure to get an itemized original receipt/invoice for any expenses.

**AFTER THE EVENT:**

• Post pictures from the event on social media.

• Complete evaluation of your event—what worked and what didn’t work?

• Send a list of attendees and their contact information to your chapter director, along with total attendance numbers.

• Work with your chapter director to pay any invoices.

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**Chapter Charitable Activities**

Many alumni participate in a wide array of service-oriented activities in their local communities. A chapter is encouraged to lead such activities and may also invite chapter members to be part of a hands-on local effort like a Habitat for Humanity build, staffing a 5K race, or volunteering at an animal shelter. However, a chapter may not sponsor or host an event, raise money for, or direct any chapter funds or event proceeds to another charitable organization.

This policy allows the chapter to avoid having to pick and choose among many worthy causes and honors the wishes of alumni and the university that the chapter be for and about the university.
Considering Special Events as a Fundraiser

While special events can be one tool in the toolbox for your chapter, we caution chapters to carefully consider doing large special events as a fundraiser.

Special events require a huge investment in time and resources from the board and chapter director, and they are often the most inefficient way to raise money. On average, it will cost your chapter fifty cents to raise one dollar, not to mention the amount of time and resources you will invest as volunteers.

Many chapters also fail to calculate their indirect costs when planning a special event; this includes volunteer hours and chapter director staff time. Simply put, is the time and work required worth the return?

Special events CAN occasionally make sense in your chapter’s programming, acting as a cultivation or marketing effort. Before moving forward with any event, however, some basic questions must be answered. Answering these questions will help the chapter determine whether or not a special event fundraiser is right for your area.

- How much money do we need/want to make?
  - Tip: Look at your budget and chapter scholarship fundraising goals.
- How much can be spent on marketing and publicity?
- How much money do we have to invest?
- Realistically, how much manpower do we have available? What would be our indirect costs?
- What groups/people are we targeting?
  - For example, are you targeting all alumni in your area? Just football fans? A certain age group?
- What incentives are we providing attendees? Where is the money going?
- How much additional risk can we afford?
- Have we calculated our break-even point?

If your chapter is considering a special event fundraiser, please contact your chapter director and work with them before moving forward.
Event Sponsorships—Be Careful!
Chapters are not nonprofit organizations with a 501(c)3 status. Therefore, chapters are unable to accept gifts while providing a tax-deduction (all annual gifts are processed through UTFI).

It is important to understand that the university is responsible to the State of Tennessee, the Board of Trustees, alumni, students, parents, and other invested parties, to show it is a good steward of the money it receives. Disregard for this, by agents representing the university, can go a long way in damaging the reputation of the institution.

No chapter associated with the Office of Alumni Affairs should be receiving gifts from individuals or organizations for the chapter general operating funds.

The main effect that this has on chapters is in regard to sponsorships of events or items provided for silent auctions. **In no way can the chapter provide a receipt of tax deductibility or promise tax deductibility when accepting the funds for sponsorships or items for silent auctions.**

Please be very careful when wording letters to ask for these from area organizations, individuals, or corporations—you should not use the words “donation” or “gift.” Instead, use “support for the event.”

In addition, some companies are not able to be sponsors at certain types of chapter events due to conflict of interest or exclusivity contracts that UT already has with other organizations.

**Please talk with your chapter director about ANY sponsorship you are working on to avoid getting into a sticky situation.**

Marketing

ALUMNI LOGOS

The Office of Alumni Affairs has a logo that has been specifically created for each one of its alumni chapters. These can be accessed in the “Leaders Toolkit” on alumni.utk.edu/chapters. Please use this logo for any of your social media
accounts (Facebook, Twitter, etc.), any publication (business card, postcard, or program), or for promotional items (t-shirts, caps, koozies, etc.). The logo showcases that your chapter is endorsed by our office and is an officially sanctioned group.

**HOW WE CAN HELP**

The Office of Alumni Affairs can assist you with the following publicity tools for each event:

- E-mails to alumni in your chapter’s geographic area
- Calendar posting on university website
- Online registration for certain events

However, chapters should not rely solely on these efforts to market their chapter and events. It is important to utilize additional marketing avenues, including social media, business cards, event calendars in your community, and local media. Each of these publicity tools should be used in conjunction with one another and should have a similar look.

**E-Mail Blasts**

As a best practice, we have discontinued mass-distributing alumni lists to our chapter leaders. However, we will gladly send two e-mails per event on your behalf to promote your activities. This streamlines the communication process and ensures that the official e-mail messages our alumni receive on the chapter program are from UT and are received in a timely manner so as not to bombard the recipients with too many e-mails. To request an e-mail blast for a chapter event, please submit the information six weeks in advance at alumni.utk.edu/chaptereventform.

Chapters are welcome to collect information from alumni attending their local events and maintain their own e-mail list. Below are some tips for maintaining your own local list:

- Local e-mail lists should only be used for chapter-related activities. The chapter can lose its charter if a list is abused (i.e. sending political e-mails, sales solicitations, e-mails that include pictures of current players, chapters mocking other schools, promoting an unsanctioned event).
- E-mails should be sent using
an e-mail marketing tool such as MailChimp or Constant Contact whenever possible. This allows for recipients to unsubscribe from the local list if they want.

- It is suggested that one person and a back-up be chosen for the e-mail responsibility, which includes designing and sending the e-mails.
- The chapter’s director should be added to local e-mail lists.

**Event Calendar Posting on Website**
The Office of Alumni Affairs maintains the alumni event calendar on alumni.utk.edu. Your chapter’s events can easily be added to this list. For each event that you would like publicity for, please fill out the chapter event submission form at alumni.utk.edu/chaptereventform.

**Online Registration for Events**
Online registration is available for select chapter events. The registration page can be customized according to the needs of each specific event and allows the university to collect updated contact information from those registering. Credit cards and checks can be processed for event registrations. We can also handle registrations when no money is involved. The event contact will receive an updated list of attendees as registrations are received. Please contact your chapter director for more information.

**SOCIAL MEDIA FOR CHAPTERS**

**Why social media?**
Social media, when used correctly, is a powerful and easy tool through which to disseminate information quickly and to a large audience.
Ideally, social media can be used to create a fun and informative online atmosphere to, ultimately, drive your target audience to act, whether that be joining the chapter, updating their alumni information, attending local events or meetings, participating in fundraising goals (chapter or university), and more!

If you have any questions about creating social media accounts, posting updates, adding administrators, or anything else related to social media, please contact your chapter director.

**General Guidelines**

Your Facebook and Twitter profile photo should be your alumni chapter logo

Facebook and Twitter profiles can be found at [tiny.utk.edu/chaptertools](http://tiny.utk.edu/chaptertools).

- Choose a cover photo or Twitter background that reflects UT’s brand.
- Use your official name given by the Office of Alumni Affairs (e.g. Charleston UT Knoxville Alumni Chapter)
- Photo options can be found at [tiny.utk.edu/chaptertools](http://tiny.utk.edu/chaptertools).
- Post frequently to help build UT’s reputation.

*Content can include:*

- Points of pride/university news;
- Chapter events, news, and programming (your own and each other’s!);
- Accomplished alumni or alumni in general;
- Athletics/spirit;
- Nostalgia (#ThrowbackThursday, traditions, photos of campus); and
- #UTGratitude (thanking donors and showing the impact of funds).

*Include a photo or video in your posts.*

- Statistics show social media posts that contain a photo or video perform better than simply text.

*Less is more when it comes to social media.*

- Keep messages short, simple, and easy to understand.

*Post often.*

- Check in frequently and respond to comments and questions, welcome new people who have liked your page, etc.

*Create an online community for your chapter.*

- Not everyone may be able to attend events, but they can feel like they are a part of your family with digital interaction.

*How to Find Good Content*

You are encouraged to interact with other official university social media accounts through tagging, mentions, shares, comments, and retweets. Such interaction leads to cross-promotion,
which is likely to increase awareness and create a uniform message to followers.

1. Follow UT Knoxville Alumni on social media and share our posts.
   - Twitter: @tennalum
   - Facebook: UT Knoxville Alumni
   - Instagram: @tennalum
   - LinkedIn: The University of Tennessee, Knoxville (university page)

2. Follow other university organizations on social media.


4. Visit alumni.utk.edu frequently for alumni news and updates.

5. Share information from eTorch, the monthly alumni newsletter, and inVOLved, the bimonthly newsletter for volunteer leaders.

Sample Social Media Updates

- Thank you for donating to the Nashville Region UT Knoxville Alumni Chapter Scholarship, @JimBob!

- Be Proud. Be Involved. Be Invested. Raise your flag for UT! #BigOrangeFriday

- It’s Spring Break! Here’s how seventy exceptional UT students are making the most of their week away from campus: http://bit.ly/1BJndZK

Your ultimate goal is to drive the audience to research more about the chapter and the university, and posting relevant, concise information with links and photos is the best way to inform your audience while giving them as much information as possible.
Serving as a Representative of the University

Please keep in mind that you are a representative of the university and that any information posted is a direct reflection upon UT's image and reputation, both positively and negatively. We encourage posting information that is respectful of all people and organizations and will reflect positively on the institution.

Chapter Awards

AWARDS PROGRAMS

The chapter president (with input from the chapter board) is responsible for making or coordinating any nominations for awards and recognition programs. In order to be considered for a chapter award, a chapter must submit the annual Chapter Summary report to the Office of Alumni Affairs at the end of the year.

There are two categories of chapter awards: accomplished and outstanding. By meeting the criteria listed in Alumni Chapter Engagement Awards, chapters can be honored as an accomplished or outstanding for the year (see the “Services to UT Knoxville” link on alumni.utk.edu/chapters).

Chapters are recognized at the Big Orange Awards Bash and on alumni.utk.edu with an electronic badge.

Volunteer Leadership Weekend and the Big Orange Awards Bash

Join fellow UT volunteers and alumni chapter leaders each spring for Volunteer Leadership Weekend, when hundreds of alumni leaders from across the nation return to campus to fortify their leadership skills, exchange ideas, and strengthen their Volunteer ties. The Office of Alumni Affairs welcomes volunteer leaders and staff from the university's alumni organizations, including alumni chapters, special interest and diversity councils, generational councils, and the Alumni Board of Directors. All actively serving alumni chapter board members are encouraged to attend.

CHAPTER SCHOLARSHIP PROGRAM

It is a goal of the Office of Alumni Affairs to have all chapters contribute to a chapter scholarship by fiscal year 2020. Scholarships are a wonderful way to connect your chapter to the local community and recruit the best and brightest students to UT. The Office of Alumni Affairs requires scholarship accounts to be maintained at UT. This offers several advantages:

- The donor receives recognition in the UT gift reporting system, and the donation is 100 percent tax deductible.
- Donations can be made online.
- Chapter leaders are protected from questioning about how they account for and disburse funds.
• Funds are secure during chapter leadership transitions.

• Funds can be easily awarded by the Office of Financial Aid.

Types of Scholarships
The Office of Alumni Affairs requires scholarships to be a minimum of $500 per year. We encourage chapters to fund as many of these annual scholarships as possible for both recruitment purposes and to provide financial assistance to multiple students from your region.

In some cases, chapters may wish to create an endowed scholarship. A scholarship is endowed with a minimum deposit of $25,000 or a commitment to fund $25,000 over five years. Funds are invested with the UT Foundation’s assets, and the interest income is disbursed as scholarships. (For FY2016, the interest rate is 4.5 percent.)

Endowment accounts have the potential to grow over time while providing current funds to award scholarships. If this is an option your chapter would like to explore, please contact your chapter director.

Establishing a Chapter Scholarship
1. Decide on the type of scholarship account that is appropriate for your chapter.

2. Contact Taylor Thomas, director of alumni student recruitment and scholarships, to discuss your intentions and establish an account. An account cannot be established until written criteria are submitted to UT Advancement Services and the Office of the Treasurer.

3. Funding the scholarship: Many chapters start with a check from the chapter treasury and
then publicize the scholarship, asking members and friends for gifts to expand it.

4. Plan the actions and fundraising activities the chapter needs to undertake in order to continually market the scholarship to alumni in your area.

**Ways to Fundraise**

Many chapters choose to fund their scholarships by designating a portion of proceeds from TV viewing parties and other social gatherings toward scholarship.

Chapters are welcome to utilize **VOLstarter** ([volstarter.utk.edu](http://volstarter.utk.edu)), an online crowdfunding platform, to raise funds for their scholarship. This option is available to chapters at any time, and the Office of Alumni Affairs is happy to help you through the process of posting your project. There are special opportunities throughout the year, such as Big Orange Give, Giving Tuesday, and Be a Hero Day, during which there is a higher amount of traffic to the VOLstarter site.

Chapter leaders will be notified well in advance so that you may take advantage of these fundraising opportunities.

**Collecting Contributions**

Checks should be made out to the UT Foundation with a note designating the funds for your chapter scholarship.

Please mail contributions to:

UT Foundation  
c/o Director of Alumni Student Recruitment and Scholarships  
Tyson Alumni House  
1609 Melrose Avenue  
Knoxville, TN 37996
When a person writes a check to a chapter scholarship, the gift is tax deductible, and a receipt will be issued to the individual. If the chapter writes a check, the chapter will receive receipt but it will have no value for tax purposes.

If individuals make payments to the chapter and, in turn, the chapter writes a check to the UT Foundation, the individuals are not eligible for a tax deduction. Therefore, when raising money for a scholarship, best practice is to direct donors to alumni.utk.edu/give to make their contribution online. Simply enter the chapter scholarship under the “other fund not listed” field. This allows the donor to receive gift credit with the university.

**Timeline**

In order for the scholarship(s) to be awarded to an incoming undergraduate student in the fall semester, we ask that funds are submitted to the Office of Alumni Affairs by February 1. The Office of Financial Aid will evaluate potential awardees in early March. They will select the recipient(s), and the director of alumni student recruitment and scholarships will notify the awardee and the chapter by April 1.

The chapter can contact the recipient(s), arrange activities with the student(s) if desired, and publicize the awarding of the scholarship(s) to the local community once the selection is confirmed.

**Selection Process**

Selection criteria must be established in writing prior to the creation of the scholarship account. Standard practice is to keep the criteria general beyond the chapter’s geographical preference so that the Office of Financial Aid can award the scholarship without the burden of restrictive and complex award criteria.

Per university policy, scholarships are open to all students regardless of race, color, religion, sex, national origin, citizenship, disability, age, or veteran status. The Office of Financial Aid will take into account a student’s financial need as determined by the Free Application for Federal Student Aid (FAFSA) as well as a student’s merit. Merit can encompass academic achievement, leadership, work experience, and volunteerism.

**Chapter Recommendations**

Chapters are considered booster organizations under National Collegiate Athletic Association (NCAA) guidelines, and any
violation is a serious matter. Chapters should never independently select a scholarship recipient. In order to protect the chapter, students, and the university, the Office of Financial Aid handles all scholarship awards.

The chapter may write a letter of support on behalf of a particular student from their area. The Office of Financial Aid will make every effort to honor recommendations made by the chapter, but the responsibility for final selection lies with financial aid staff.

Alumni Student Recruitment Efforts

The Office of Alumni Affairs and the Office of Admissions have a strong partnership. We recognize that alumni serve as valuable extensions of the university in their communities, and they are some of our very best recruiters. The purpose of the alumni recruitment program is to broaden the reach of the Office of Admissions through the recruitment efforts of enthusiastic, well-trained, and knowledgeable alumni across the country, and chapters play a key role in these efforts.

Roles and Responsibilities of the Alumni Student Recruitment Volunteer

- Identify and maintain contact with prospective Vols from their geographic area and represent UT at recruitment activities and events
- Act as a liaison between prospective Vols and the director of alumni student recruitment and scholarships
- Participate in/coordinate activities for prospective and accepted students
- Become familiar with basic admissions information and current UT statistics

Alumni are encouraged to share personal experiences with prospective Vols, but it is essential to remember that you are also a representative of the university. Volunteers are expected to abide by professional recruitment practices. As alumni, you are considered boosters under National Collegiate Athletic Association (NCAA) guidelines. We encourage all alumni to recruit the best and brightest to UT, but only authorized institutional staff members are permitted to recruit prospective student-athletes. Any violation will result in serious repercussions for the student-athlete and the university.

For more information, please visit UT Athletics Compliance (utsports.com/compliance/boosters).
OVERVIEW OF RECRUITMENT OPPORTUNITIES

There are several ways that chapter members can get involved as alumni student recruiters.

**Future Vols** *(admissions.utk.edu/futurevols)*

Do you know a high school or college transfer student UT should contact about becoming a Volunteer? Is your daughter, cousin, nephew, or neighbor a good fit for UT?

If so, we want to introduce them to our great university. By submitting the online form using the link above, the Office of Admissions will reach out to prospective Vols directly.

The Office of Alumni Affairs is also happy to provide you with Future Vol cards, which can be handed out to prospective Vols in your area. Cards are printed with information on how students can get in touch with UT Admissions.

**Letter Writing**

Congratulate students in your area who have been accepted to UT through a handwritten note. The Office of Alumni Affairs is happy to provide a list of students, stationery, and stamps.

**Scholarship Presentations**

Does your chapter provide a scholarship to deserving students in your area? You may be able to attend an end-of-school-year awards ceremony to present the scholarship award to the recipient(s) at their high school. Please contact your chapter director or Taylor Thomas to learn more.

**Rocky Top Tailgate**

High school juniors, seniors, and transfer students are welcomed to campus during the fall football season to experience a one-of-a-kind tailgate. They meet their admissions counselor, go on tours, and enjoy a game alongside 102,455 fans in Neyland Stadium. There are ample opportunities to mix and mingle with students and share your UT experience with hundreds of prospective Vols. Rocky Top Tailgates are typically held in September and November.

**New Vol Roll Call**

These events for accepted students are held in the spring. The goal is to welcome new Vols to the Big Orange
GETTING INVOLVED

To obtain training and resource materials for your chapter, please contact Taylor Thomas, director of alumni student recruitment, at rthoma45@utk.edu or 865-974-8512.

University Policies

CHAPTER LEADER LIABILITY

Chapter board members are covered under the UT Foundation’s general liability insurance policy as long as the event is conducted in compliance with the Office of Alumni Affairs’ alcohol policy. This means volunteers would be defended and any judgment or settlement paid when the chapter is named in a filed suit.

The University of Tennessee, Knoxville, Office of Alumni Affairs cannot prevent anyone from bringing suit against individual board members. In this event, and if a jury were to find gross negligence, intentional conduct, or noncompliance with the Office of Alumni Affairs’ alcohol policy, there is potential personal liability. The risk is higher at any event at which alcohol is served. The Office of Alumni Affairs and the UT Foundation have taken reasonable steps to minimize board members’ personal liability exposure.

The association’s policy is not intended to replace any individual alumni leaders’ personal liability insurance coverage. All chapter leaders are encouraged to consult with their own insurance agent regarding their personal insurance needs. Whether or not a chapter chooses to have an event at which

Family and to encourage students who have not formally accepted UT’s admissions offer to do so. The headline event is held in Knoxville during the weekend of the Orange and White Game in April, but the Office of Admissions also brings Roll Calls to other cities such as Nashville, Kingsport, Atlanta, Chicago, Chattanooga, Cincinnati, Washington, DC, Memphis, and Charlotte. These celebratory events attract large crowds, and there is always a need for alumni recruitment volunteers in several capacities.

Summer Send-Offs

Send-Offs recognize students who have committed to the university. Planned by chapters in their communities, in conjunction with the Office of Admissions, Send-Offs welcome incoming students and their parents into the UT Knoxville family.

College Fairs

College fairs provide students and parents with the opportunity to meet with university representatives and learn about academic programs, admission and financial aid procedures, and student life.

Counselors from the Office of Admissions attend many fairs across the country and often partner with alumni to manage the UT table.

Chapter leaders may also be asked to represent UT at smaller fairs or events where the local admissions counselor is unable to attend.

The Office of Admissions provides recruitment materials, UT-branded tablecloths, and other items so that alumni are prepared for the event.
alcohol is served, ultimately, is up to your board members.

FINANCIALS

Each chapter is responsible for maintaining their own financial records. A chapter has the responsibility to keep the chapter in good standing and budget accordingly.

To ensure that funds are being used appropriately, the chapter treasurer should provide reports at each board meeting as to the status of the account. In addition, the Office of Alumni Affairs asks that the chapter provide a year-end summary of the chapter’s expenses and revenue for the calendar year.

Chapters are required to open and maintain a checking account at a banking institution in the chapter’s area if they are handling money for the chapter. Checking accounts are to be set up under the UT Alumni Association’s federal tax ID number.

All checks on the chapter account should be signed by the treasurer or president, or set up to require both signatures. The account signature card must contain the names of the current treasurer and president, as well as the past president. In order to ensure all expenses are covered by the chapter, the account will be the responsibility of the treasurer. All signors on the account shall also have access to the online banking account for the chapter checking account. The treasurer is the sole administrator of funds from the account with advisory access to the president and past president.

Please contact your chapter director if you need to open an account or move banks. Your chapter director can provide you with a tax-exempt letter and additional documentation to make the process go smoothly.

TAX IDENTIFICATION

The University of Tennessee is a sales tax-exempt organization in the state of Tennessee. As part of this organization, chapters are given the opportunity to utilize this benefit. Unfortunately, this benefits in-state chapters more than out-of-state chapters, due to the rules of the Tennessee Department of Revenue.

Tax can be a large expense for a chapter when paying for an annual alumni event or another alumni activity, especially in Tennessee where on average the sales tax is at least 9 percent for each sale. Use this benefit to your advantage, as you need to
save pennies where you can for the chapter.

Please keep in mind that in order to properly use the university’s tax-exempt status in Tennessee, the invoice must be made out to a UT chapter and paid for with a UT chapter’s banking account. An individual purchasing something for a chapter would still have to pay sales on that purchase, unless they are making the purchase with a check or debit card from the chapter’s checking account.

It is very important that you follow these guidelines. If you have any questions about the tax-exempt status of the university, please contact your chapter director.

**NCAA COMPLIANCE**

One of the important cornerstones of the Athletics program at UT is the loyalty and enthusiasm of Volunteer fans who support our teams.

We must be cautious, however, not to violate the very specific rules and regulations of the National Collegiate Athletic Association (NCAA) or the Southeastern 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 sporting 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.

If you have any questions, call the Tennessee Athletics Compliance Office at 865-974-3871 or contact your chapter director. The university is charged with the responsibility to exercise "institutional control" of its athletic interests and is committed to maintaining the kind of responsible program in which all of us take such great pride.

**DATA CONFIDENTIALITY**

UT is committed to keeping the trust of its alumni and friends in caring for their personal contact information. The university is entrusting you, as an alumni leader, to use this information only for official business associated with your chapter, such as writing thank-you notes to donors that gave to your scholarship. Any board members with access to alumni data must sign an agreement with the UT Foundation concerning the usage of that information.

If the data entrusted to you is handled outside of the parameters laid out in the agreement, the university will take actions in accordance with the breach of the agreement.

**DATA MANAGEMENT**

UT is committed to keeping up-to-date contact information for as many alumni and friends as possible. In doing this, chapters are asked to help the Office of Alumni Affairs continue to collect information from alumni.

It is incredibly helpful to the university when you provide updated alumni information to the Office of Alumni Affairs. If alumni are providing you
with updated information, they are likely assuming that you are updating it with the office as well.

The UT alumni database is quite large and we may have more than 100 alumni with the name John Smith in our database, therefore the more information about the alumnus we can receive from them, the more likely we are to be able to identify which John Smith needs to be updated. Whenever possible, we need the person’s name, graduation year, address, phone number, and e-mail address.

You can also point alumni to alumni.utk.edu/contact, where they can update their contact information.

LOGOS

The logos of the University of Tennessee, Knoxville, are trademarked and licensed. Chapters do not have the right to use these logos on their pages or on printed items without specific permission. Please note that athletic logos are only to be used for athletic-focused events with the permission of the University of Tennessee. For example, this would include the Power T, Lady Vols, Smokey, the orange and white checkerboard, and any other licensed and/or trademarked logo of the UT Athletics department.

The Office of Alumni Affairs has provided each chapter with a chapter-specific logo that conforms to our brand standards. These can be found at alumni.utk.edu/chapters. We encourage chapters to use these logos to brand themselves in accordance with university standards.

Please speak with your chapter director if you have questions.

CODE OF CONDUCT

A local alumni chapter is, by its very definition, a representative of UT to its community. While alumni and friends understand the reputation and long traditions, those not connected with the university may only have the local chapter on which to base their opinions. It is important for chapter leaders to put the university’s best foot forward at all times, particularly as ambassadors for UT. All chapter leaders must sign the university’s Code of Conduct upon joining their chapter board.
BOARD MEMBER CODE OF CONDUCT

The University of Tennessee, Knoxville, Office of Alumni Affairs expects all volunteers to understand that they are representing the university in their role. As a leader of the Office of Alumni Affairs and your local chapter board, you are expected to represent the university in a manner that does not jeopardize the reputation, integrity, or mission of the university. When taking on a role within the Office of Alumni Affairs, each member must agree to the below Code of Conduct for chapter board members.

As a Volunteer I will:

• Represent the Office of Alumni Affairs and the University of Tennessee, Knoxville, with professionalism, dignity, and pride and be responsible for conducting myself with courtesy and appropriate behavior.

• Display respect and courtesy for employees, other volunteers, other alumni and friends of the university, event participants, opposing universities alumni and friends, and property.

• Keep personal opinions and actions separate from those made as a representative of the university and the Office of Alumni Affairs.

• Use information and contact information for alumni and friends of the university within the guidelines of the Data Confidentiality Policy of the Office of Alumni Affairs, and UT Foundation information should never be used for soliciting or marketing personal products or services.

• Follow through and complete accepted tasks on behalf of the chapter.

• Seek training for my volunteer role by participating in meetings, self-study, or other training opportunities.

• Keep staff informed of progress, concerns, and problems within the program(s) in which I participate. Avoid conduct which would jeopardize the chapters and the Office of Alumni Affairs’ effectiveness.

• Practice responsible alcohol consumption at chapter- and Office of Alumni Affairs-sponsored events.

• Make every effort for all actions of self and fellow chapter leaders to be within the guidelines and policies of the Office of Alumni Affairs, UT Foundation Inc., and the University of Tennessee, Knoxville.
As a volunteer I will not:

• Be under the influence of illegal drugs at Office of Alumni Affairs-sponsored events.

• Use vulgar or inappropriate language while representing the university.

• Hold events at inappropriate venues or venues that do not uphold the integrity of the university or the Office of Alumni Affairs.

• Hold events that have not been approved by the Office of Alumni Affairs.

• Post inappropriate pictures and/or comments on group or university websites, in e-mails, or on social networks.

• Discriminate on the basis of race, color, national origin, religion, sex, pregnancy, marital status, sexual orientation, gender identity, age, physical or mental disability, or covered veteran status.
SAMPLE CHAPTER BOARD MEETING AGENDA

Chapter Name_________________________________________________________

Date_______________________________________________________________

Time __________________________________________________________________

Location __________________________________________________________________

I. Welcome & Call to Order
   XXX

II. Review of Minutes
    XXX

III. Report
    XXX
    Treasurer’s Report
    XXX
    Philanthropy Chair Report
    XXX

IV. Old Business
    Results from Fundraiser
    XXX
    Season Review of TV Viewing Parties
    XXX

V. New Business
    Recruitment of Communications Chair
    XXX
    Faculty Speaker Event
    XXX

VI. Adjourn
    XXX

Date, Location, and Time of Next Meeting

Save the Date(s): Listing of Upcoming Events
CHAPTER EVENT EVALUATION FORM

Chapter: _______________________________________________________________

Event date: _____________________________________________________________

Planner/Organizer: _____________________________________________________

Time: __________________________________________________________________

Location: _______________________________________________________________

Address: _______________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
Contact person at venue: _______________________________________________

University officials/representatives attending: _____________________________
_____________________________________________________________________
_____________________________________________________________________

Names of key alumni in attendance: _____________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________

Program (outline of what took place):

_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________

This event fell under the following Services to UT Knoxville categories:

☐ University Programming       ☐ Student Engagement
☐ Athletics                   ☐ Social/Networking
☐ Community Service           ☐ Special Interest/Diversity
☐ Philanthropic

How did this event advance the university?
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________

This event would have been more valuable if:
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________

The most important things gained from the event were:
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
Is this event worth repeating for your chapter?  Yes  No

If no, explain:
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________