



ALUMNI CHAPTER MANUAL



DEAR CHAPTER LEADER

It's an honor serving as Associate Vice Chancellor of Alumni Relations at the University of Tennessee, Knoxville. In my role, I have the awesome responsibility for setting and achieving alumni engagement goals for the university, creating strategies, and planning programs that will advance UT and enrich the lives of students and alumni. Annually, we set goals to increase our overall alumni engagement numbers, increase the number of student scholarship endowments, and achieve 100% participation from our volunteer leaders. We count on your partnership and leadership to help us achieve these goals and more.

As a chapter leader, you play a vital role in supporting our students and involving alumni in the life of the university. To help in these efforts, our chapter program team put together this manual to assist you in 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 for helping us make this the greatest decade ever for UT.



Duane Wiles
Associate Vice Chancellor of Alumni Relations



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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*, 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 at alumni.utk.edu/chapterresources.

CHAPTER LIAISONS

Each chapter is provided an alumni staff representative, known as a chapter liaison, to work with you by providing guidance and direction in governing your chapter. Your chapter liaison 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 liaison is a resource equipped with knowledge of alumni relations, volunteer management, and university policies. They are not, however, there to do the job for you.

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

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

- 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 for information about the university.
- Helps educate a chapter president and board about the policies and procedures applicable to a chapter.
- Handles request for speakers, travel arrangements, and briefings for university speakers.
- Guides chapters to be within “institutional control” of the university within the guidelines of the NCAA.

CHAPTER STAFF



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John earned a bachelor's degree in English from UT in 2009. He oversees the alumni chapter program and serves as staff liaison to chapters in multiple regions across the country, partnering with them to implement programs and events that engage alumni, recruit students, and raise money for scholarships.



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Meghan earned a bachelor's degree in hotel, restaurant and tourism management from UT in 2012 and a master's degree in Student Affairs from Clemson in 2014. She joined the UT Alumni team in 2022 and serves as staff liaison to chapters across the country, from the west coast to the Carolinas, working with volunteer leaders to implement alumni programs and events.

SCHOLARSHIPS STAFF



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Mary received her bachelor's in sociology from the UT in 2014 with a double concentration in criminology/criminal Justice. She joined the UT Alumni team in 2018 and provides administrative support for the chapters program and the student recruitment and scholarships program.

ALUMNI CHAPTER PROGRAM OVERVIEW

The Alumni Chapter 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 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 Relations 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 liaison 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 help the university to engage alumni in their local communities. Specifically, alumni chapters:

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

Chapter Names

The naming convention for alumni chapters is town, county, or region name + UT 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 Alumni Chapter OR
Dallas/Fort Worth UT Alumni Chapter

Chapter Governance

All chapter oversight is provided by the Office of Alumni Relations 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 Office of Alumni Relations 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 criteria may deem necessary.
- (b) Chapters and councils may call meetings, set up objectives and a program of activities, survey local alumni, and make program recommendations thereon to the UT Knoxville Alumni Relations 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 Relations and Annual Giving. Each chapter shall submit an annual financial statement and yearly summary of activity to the UT Knoxville Office of Alumni Relations.
- (d) Each council shall submit a yearly summary of activity to the UT Knoxville Office of Alumni Relations.
- (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 Relations or Board of Directors unless approved in advance by the UT Office of Alumni Relations.



LEADERSHIP, STRUCTURE, AND ORGANIZATION

Examples of Leadership Roles and Responsibilities may be adapted to suit the needs of the chapter. Please consult with your staff liaison.

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. 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 liaison. 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.

Depending on local circumstances, a larger chapter may want to consider this additional position:

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.

CHAPTER BOARD ROLES AND RESPONSIBILITIES

An alumni chapter board 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 UT. 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 hosted and presented by the chapter.
- Promote 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 send to your chapter liaison.
- Communicate with your chapter liaison 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 of the Office of Alumni Relations.
- Support the mission through actions of the chapter and UT.
- Represent the university in a positive light at all times.
- Adhere to the Office of Alumni Relations' 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 liaison as to how to proceed in the best interest of your chapter.

BOARD MEMBER CODE OF CONDUCT

The UT Office of Alumni Relations expects all volunteers to understand that they are representing the university in their role. 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 Relations, each member must agree to the below Code of Conduct for chapter board members.

As a Volunteer I will:

- Represent the UT Knoxville Office of Alumni Relations and the University of Tennessee 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.
- Actively participate as a volunteer leader by attending board/council meetings and serving on committees when needed, as well as attending events.
- Keep personal opinions and actions separate from those made as a representative of the university and the UT Knoxville Office of Alumni Relations.
- When prompted, complete the Data Confidentiality Policy Agreement (valid for one year).
- Use information and contact information for alumni and friends of the university within the guidelines of the Data Confidentiality Policy of the UT Knoxville Office of Alumni Relations and UT Foundation, Inc. Information should never be used for soliciting or marketing personal products or services.
- Demonstrate fiscally responsible practices during the planning and execution of events.
- Seek training for my volunteer role by participating in meetings, self-study, or other training opportunities.
- Keep staff informed of progress, concerns, or problems within the program(s) I participate.
- Avoid conduct that would jeopardize the chapter or council and the UT Knoxville Office of Alumni Relations' effectiveness.
- Practice responsible alcohol consumption at chapter or council events and UT Knoxville Office of Alumni Relations sponsored events.
- Adhere to the guidelines of the social media agreement.
- Make every effort for all actions of self and fellow volunteer leaders to be within the guidelines and policies of the UT Knoxville Office of Alumni Relations, UT Foundation, Inc., and University of Tennessee.

As a Volunteer I will not:

- Be under the influence of illegal drugs at UT sponsored events, including alumni chapter or council events.
- Use vulgar or inappropriate language while representing the university.
- Hold events at inappropriate venues: venues that do not uphold the integrity of the university or the UT Knoxville Office of Alumni Relations..
- Post inappropriate pictures and/or comments on group or university web sites, emails, or on social media pages.
- 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.

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. The Office of Alumni Relations will send an email to all alumni in each area during the month of April to solicit applications.
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 July 1 and will cease on June 30. 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. The president of the alumni chapter must be a graduate of UT Knoxville. However, non-alumni 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 email 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 email 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. *In the case of a tie, a representative of the chapters staff will provide an anonymous vote to break the tie.
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 Relations' Code of Conduct. 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 liaison 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 Relations can remove a board member without a vote if that board member is in violation of the Code of Conduct.

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 Relations.
- Conduct yearly leadership retreats and encourage your board to take advantage of UT resources to train new leaders—resources include the 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 co-direct events to provide guidance.

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 liaison. As a guide, many chapters meet monthly or every six weeks, conducting other business by email between meetings. When feasible, the chapter liaison will also be in attendance.

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 the meeting.
1. Distribute an agenda a few days before the meeting.
2. Communicate the importance of everyone attending.
3. Try to limit meeting to 1 hour. Start and end the meeting on time.
4. Ask committee chairs to prepare and submit written reports prior to the meeting. (This will assist the secretary with minutes.)
5. Stick to the agenda. Ask participants to notify you ahead of time with any items that need to be included on the agenda.
6. See that all members have a chance to participate.
7. Ensure that assignments for follow-up action are clearly understood.
8. Distribute minutes in a timely fashion following the meeting. Copy your chapter liaison on the minutes that are sent out.

Sample Chapter Board Meeting Agenda

- I. Welcome & Call to Order
- II. Review of Minutes
- III. Reports
 - Treasurer's Report
- IV. Old Business
 - Results from Fundraiser
 - Season Review of Vol Watch Parties
- V. New Business
 - Recruitment of Communications Chair
 - Faculty Speaker Event
- VI. Adjourn

Next Meeting Date, Location, and Time

Save the Date(s): Listing of Upcoming Events



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 alumni in every stage of life. Programs may include admissions-related events, university speakers, cultural activities, career development activities, and more.

The *Services to UT* document can be used to guide alumni chapters in serving the university, current and prospective students, and alumni. This document can be found on alumni.utk.edu/chapters/resources. 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 Relations can, when available, provide the chapter with university promotional tools for your event outside of the annually allocated swag. Please contact your chapter liaison with questions about the swag portal.

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 UT Foundation Inc. (UTFI) policy, ALL CONTRACTS must be signed by an authorized signer 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 liaison.

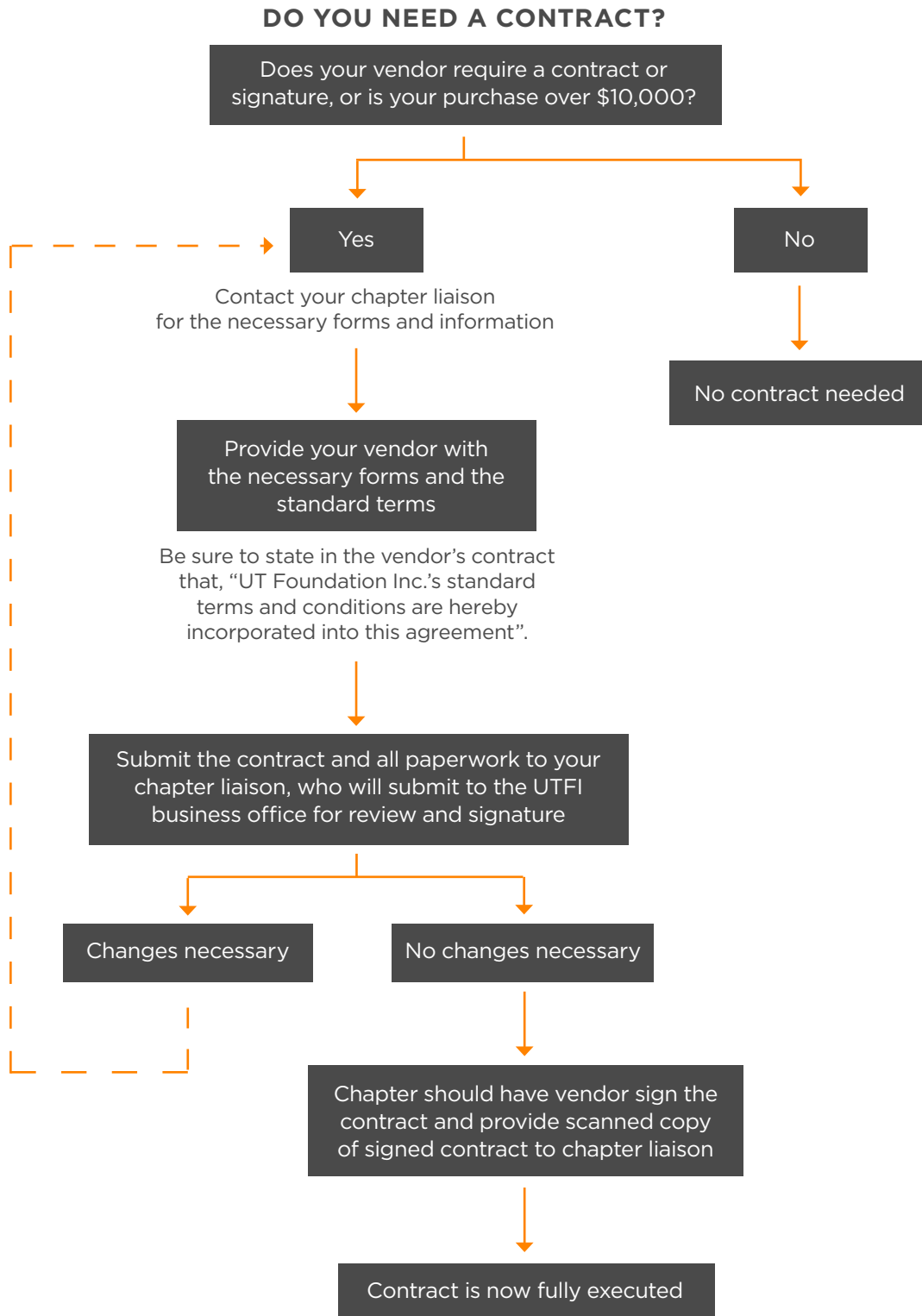
One of the key reasons for this policy is to ensure that our alumni leaders are covered by UTFI policy. This policy is set to protect UTFI, the Office of Alumni Relations, and all of its chapters and councils.

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 signer/contracting party on a contract is legally bound by its terms. UTFI is the contracting party when the contract is signed by an authorized signer. Chapters leaders are not authorized signers 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 liaison.

CONTRACT PROCESS REQUIREMENTS

Any contract your chapter obtains must be signed by an approved signer of UTFI and not a chapter leader.



ALCOHOL POLICY

The Office of Alumni Relations 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 non-alcoholic 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 Relations.

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 board to answer some key questions:
 - What are the goals of the event?
 - How does this event fit in with the Services to UT?
 - 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?
- Select date, venue, theme, and/or guest speaker(s) if applicable. Your chapter liaison should be the only person contacting potential university speakers.
- If a contract needs to be signed, send the contract to your chapter liaison for processing by the business office.

EIGHT WEEKS OUT

- Create a marketing plan for the event to include email and social media.
- Begin work on design for any printed materials at the event (e.g. signage or a printed program).

SIX WEEKS OUT

- Fill out the Chapter Request Form—your chapter liaison will receive this information and ensure it gets up on the website and that an email 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:
 - Greeting and signing in guests;
 - Making welcoming comments, explaining the chapter's role;
 - General program moderator (e.g. introduction of speakers);
 - Audio/visual lead, setting up projector, background music, etc.;
 - Vendor on-site contact; and
 - Setup and cleanup crew.
- Targeted email blast sent by the Office of Alumni Relations.
- Begin social media campaign to promote the event.

TWO WEEKS OUT

- 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 Relations website, the office will send an event reminder and print name-tags.
- If the chapter is handling registration, it should send a reminder email and print name-tags 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 welcoming remarks, thank them for coming, etc.
- Conduct your event.
- 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.
- Take photos during the event. Check out [this guide](#) for tips on photographing an event.

AFTER THE EVENT

- Post pictures from the event on social media.
- Send a list of attendees and their contact information to your chapter liaison, along with total attendance numbers.



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.

Our mission is to advance UT by supporting it and our students philanthropically.

UT PROMOTIONAL NIGHTS POLICY

In order for the UT Knoxville Office of Alumni Relations to promote an event where the office or an alumni chapter is partnering with any outside organization or business, there must be a component where said organization makes a donation to the UT Knoxville Alumni Chapter Scholarship/Endowment in that area. A great example of this type of event would be the annual UT Night at the Atlanta Braves outing.

Example:

The Atlanta Braves give the Office of Alumni Relations a selection of dates to choose from a few months prior to the night chosen. The Braves then provide us with a ticket link to promote to alumni in the area. In the past, we have promoted to Atlanta, Chattanooga, and Knoxville markets. The ticket package includes three ticket options at different price points, a UT branded hat, and a donation to the Atlanta UT Knoxville Chapter Scholarship. See below for ticket options.

1. \$28-Grandstand Infield, UT branded hat, and a \$3 donation
2. \$35-Home Run Porch, UT Branded hat, and a \$3 donation
3. \$46-Terrace Reserved, UT Branded hat, and a \$3 donation

*It is important to note that the hat does not impact the cost of the tickets. Also, when someone purchases the ticket, then he/she must select the hat and the donation option on the menu.

This promo night has been a success for us the last couple of years; for perspective see below:

2018-1,000 tickets sold, \$3,000 to the Atlanta Chapter Scholarship

2019-1,236 tickets sold, \$3,708 to the Atlanta Chapter Scholarship

Based on the success and partnership from both parties on this type of outing, it is important for the organization to include a donation to the local alumni chapter scholarship.



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 liaison, and they are often the least efficient way to raise money.

Many chapters also fail to calculate their indirect costs when planning a special event; this includes volunteer hours and chapter liaison 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 money do we have to invest?
- How much can be spent on marketing and publicity?
- 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 liaison 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.

Chapters associated with the Office of Alumni Relations are able to raise money for their operating funds; however, those are not charitable donations to the chapter or the university.

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 liaison about ANY sponsorship you are working on to avoid getting into a sticky situation.

**NET REVENUE
EQUALS
GROSS REVENUE
MINUS
COSTS
(DIRECT AND INDIRECT)**

MARKETING

ALUMNI LOGO

The Office of Alumni Relations has a shortcut logo and a social media icon that has been specifically created for each one of its alumni chapters. Logos can be accessed in the [Chapter Leaders Toolkit](#).

Please use the social media icon for any of your social media accounts (Facebook, Twitter, etc.). Use either your full logo or your shortcut logo for publications (business card, postcard, or program), or for promotional items (t-shirts, caps, koozies, etc.). The logos showcase that your chapter is endorsed by our office and is an officially sanctioned group.

The elements of logos should not be separated from one another and the Power T should not be used alone. If you plan on selling or giving away any merchandise with our logos, the Power T must have a registration mark.

Alumni Unit Shortcut Logo



Logo on Merchandise (use registration mark)



TENNESSEE ATHLETICS LOGOS

The Tennessee Athletics logos are trademarked and licensed. Neither chapters nor the Office of Alumni Relations are legally allowed 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 UT Office of Trademark Licensing. For example, athletic logos include the Power T, Lady Vols, Smokey, the orange and white checkerboard inside the state of Tennessee, and any other licensed and/or trademarked logo of the Tennessee Athletics department. These should not be incorporated in chapter illustrations or used on chapter t-shirts or signage.

HOW WE CAN HELP

The Office of Alumni Relations can assist you with the following publicity tools:

- Emails 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.

Event Calendar Posting on Website

The Office of Alumni Relations 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/chapterrequest.

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 liaison for more information.

Email Blasts

As a best practice, we have discontinued mass-distributing alumni lists to our chapter leaders. However, we will gladly send two emails per event on your behalf to promote your activities. This streamlines the communication process and ensures that the official email 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 emails. To request an email blast for a chapter event, please submit the chapter request form six weeks in advance and inform your chapter liaison.

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

- Local email lists should only be used for chapter-related activities. The chapter can lose its charter if a list is abused (i.e. sending political emails, sales solicitations, emails that include pictures of current players, chapters mocking other schools, promoting an unsanctioned event).
- It is suggested that one person and a back-up be chosen for the email responsibility, which includes designing and sending the emails.
- The chapter's liaison should be added to local email lists.

SOCIAL MEDIA FOR CHAPTERS

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 social media, please contact your chapter liaison.

General Guidelines

- Start simple. We recommend starting with Facebook and creating a page versus a group. Pages deliver more credibility and are less demanding for admins.
- Use your [official chapter social media logo](#) to create brand credibility for your page and to differentiate your page from general fan pages that are not affiliated with the university.
- Use your official name given by the Office of Alumni Relations: (Location) + UT Alumni Chapter.
 - By using the official name, alumni and friends can easily find a list of chapter accounts when searching “UT alumni chapter”. This also helps the Office of Alumni Relations in tagging your chapter in post!
- Choose a cover photo or Twitter background that reflects UT’s brand or the city where your chapter is located. Download an image from the [photography Dropbox](#).
- Include a photo and video in your posts.
 - Be sure to mix up your content so that your timeline has a diverse collection of visuals to attract the attention of multiple audiences.
- 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.

Content can include:

- University news and points of pride: alumni.utk.edu/points-of-pride
- Chapter events, news, and programming (all chapters)
- Accomplished alumni or an alumni in your chapter who is demonstrating the Volunteer spirit
- Tennessee Athletics
- Nostalgia (#ThrowbackThursday, traditions, campus photos)
- #UTGratitude (thank donors and show the impact of funds)

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](https://twitter.com/tennalum)

Facebook: [UT Knoxville Alumni](https://www.facebook.com/UTKnoxvilleAlumni)

Instagram: [@tennalum](https://www.instagram.com/tennalum)

LinkedIn: [University of Tennessee, Knoxville](https://www.linkedin.com/company/university-of-tennessee-knoxville) (university page)

2. Follow other university organizations on social media.
3. Visit alumni.utk.edu frequently for alumni news and updates.
4. Keep an eye out for UT email newsletters for interesting campus related content.

Sample Social Media Updates

- Thank you for donating to the Nashville Region UT Alumni Chapter Scholarship, @JimBob!
- Raise your flag for UT! #BigOrangeFriday

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.



CHAPTERS 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 Relations at the end of the year.

Big Orange Awards Bash

There are three categories of chapter awards: accomplished, outstanding, and annual spotlight awards. By meeting the criteria listed in Alumni Chapter Engagement Awards, chapters can be honored as an accomplished or outstanding for the year. Visit the [Chapter Leader Resource Center page](#) and download the “Chapter Awards Criteria” PDF. Chapters are recognized at the Big Orange Awards Bash.

Chapter Leaders Workshop

Join fellow volunteers and alumni chapter leaders each fall for the Chapter Leaders Workshop, when many alumni leaders from across the country return to campus to fortify their leadership skills, exchange ideas, and strengthen their Volunteer ties. All actively serving alumni chapter board members are encouraged to attend.



CHAPTER SCHOLARSHIP PROGRAM

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 Relations 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

In order to be considered active, a chapter must have an endowment. 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. New alumni chapters have access to the \$12,500 Alumni Scholarship Match which reduces the necessary contribution to endow a scholarship to \$12,500.

“

You have made a positive impact in my life through scholarships and resources on our campus. The financial aid that I have received from the university and private donors has helped me stay focused on academics. I believe it is important for alumni to give back to the university. Getting scholarships has helped me to continue following my aspirations without worry.”

—Alay Mistry ('24), Microbiology



ESTABLISHING A CHAPTER SCHOLARSHIP

1. Contact Taylor Thomas, senior director of scholarships and endowments, to discuss your intentions and establish an endowment.
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.

Timeline

The Office of Alumni Relations will evaluate potential awardees in early May. They will select the recipient(s), and the director of alumni student recruitment and scholarships will notify the awardee and the chapter by August 1.

Ways to Fundraise

Many chapters choose to fund their scholarships by designating a portion of proceeds from Vol Watch Parties and other social gatherings toward scholarship.

Chapters are welcome to utilize VOLstarter (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 Relations is happy to help you through the process of posting your project.

There are special opportunities throughout the year, such as Big Orange Give and Alumni Scholarship Challenge, during which there is a higher amount of traffic to the VOLstarter site.

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



Selection Process

Standard practice is to keep the criteria general beyond the chapter's geographical preference so that the Office of Alumni Relations 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 Alumni Relations 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 should never select a scholarship recipient. In order to protect the chapter, students, and the university, the Office of Alumni Relations handles all Alumni Scholarship awards. The chapter may write a letter of support on behalf of a particular student from their area.

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
Tyson Alumni Center
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 giving.utk.edu/scholarships 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.

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.

ALUMNI STUDENT RECRUITMENT EFFORTS

The Office of Alumni Relations 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 student and young alumni programs coordinator
- 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 Tennessee [Athletics Compliance](#).

GETTING INVOLVED

To obtain training and resource materials for your chapter, please contact Michala Manfredo-Ullmann, student and young alumni programs coordinator, at michala@utfi.org or 865-974-2513.



OVERVIEW OF RECRUITMENT OPPORTUNITIES

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

Future Vols

Do you know a high school or college transfer student UT should contact about becoming a Volunteer? If so, we want to introduce them to our great university. By submitting an online form, the Office of Admissions will reach out to prospective Vols.

The Office of Alumni Relations 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.

Welcome-A-Vol Letter Writing

Each spring semester, you can congratulate students in your area who have been accepted to UT through a handwritten note. The Office of Alumni Relations provides 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. Contact your chapter liaison 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 101,915 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 fall and spring. The goal is to welcome new Vols to the Big Orange 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. 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.



THE UNIVERSITY OF
TENNESSEE
KNOXVILLE

Office of Alumni Relations

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