

CLUB LEADERS

HANDBOOK

A RESOURCE GUIDE

UPDATED SEPTEMBER 2020



GO PURDUE



TABLE OF CONTENTS

INTRODUCTION	2
STATEMENT OF INTEGRITY	3
VOLUNTEER CONDUCT AND EXPECTATIONS	4
COMMUNICATIONS	4
PRIVACY AND CONFIDENTIALITY	4
VIOLATION OF CODE OF CONDUCT	4
CLUB PROGRAM	5
PURPOSE OF SANCTIONING CLUBS	5
ANNUAL REQUIREMENTS	5
MEMBERSHIP	6
RELATIONSHIPS	6
CLUB RECOGNITION	6
GOLD, SILVER, AND BRONZE AWARD REQUIREMENTS	7
DUES SHARING & SCHOLARSHIP DONATIONS FOR GOLD & SILVER CLUBS	8
DUES SHARING	8
SCHOLARSHIP DONATIONS	8
SUPPORT FOR SANCTIONED ALUMNI CLUBS	8
SANCTIONED CLUB WEBSITES	9
ALUMNI PORTAL	9
PURDUE ALUMNI CLUB SCHOLARSHIP PROGRAM	10
WHAT TYPES OF SCHOLARSHIPS ARE AVAILABLE?	10
HOW ARE CLUB CONTRIBUTIONS MADE?	10
ARE SCHOLARSHIP CONTRIBUTIONS TAX DEDUCTIBLE?	10
WILL COMPANIES WITH MATCHING GIFT PROGRAMS MATCH GIFTS FOR THESE SCHOLARSHIPS?	10
HOW ARE SCHOLARSHIP RECIPIENTS SELECTED?	11
CLUB-SELECTED SCHOLARSHIPS	11
AWARDING TIMELINE	11
WHO DECIDES HOW MANY SCHOLARSHIPS WILL BE AWARDED AND THE AMOUNT OF EACH?	11
WHAT CRITERIA ARE COMMONLY USED TO GUIDE THE DIVISION OF FINANCIAL AID?	11
UNIVERSITY SPEAKERS AT CLUB EVENTS	12
PURDUE ALUMNI AWARDS PROGRAM	12
APPENDICES	
APPENDIX A: PURDUE ALUMNI CLUB AGREEMENT	13
APPENDIX B: VOLUNTEER CONFIDENTIAL FORM	14
APPENDIX C: DISCLOSURE AGREEMENT FOR STUDENT ADDRESSES	15
APPENDIX D: EVENT CHECKLIST AND BUDGET ESTIMATE SHEET	16
APPENDIX E: AUCTION AND RAFFLE AS FUNDRAISERS	18
APPENDIX F: SPEAKER REIMBURSEMENT	19
APPENDIX G: MEMBER AND NONMEMBER PRICING GUIDELINES	20
APPENDIX H: PLANNING ONLINE EVENTS	21
APPENDIX I: SAMPLE ALUMNI INTEREST SURVEY	23
APPENDIX J: AGREEMENT TO MAINTAIN FUNDS FOR PURDUE ALUMNI CLUB	25
APPENDIX K: HOLDING EFFETIVE CLUB BOARD MEETINGS	26
APPENDIX L: PURDUE ALUMNI CLUB CONSTITUTION TEMPLATE	27
APPENDIX M: TREASURER'S TO-DO LIST	29
APPENDIX N: LIABILITY INSURANCE COVERAGE	30
APPENDIX O: WAIVER, RELEASE, AND HOLD HARMLESS AGREEMENT	31
APPENDIX P: ACCIDENT REPORTING AND INVESTIGATION FORM	32
ALUMNI OUTREACH STAFF	33

INTRODUCTION

Welcome to the Purdue Alumni Association Club Leaders Handbook, a compendium of important information and resources designed to help you run a successful club that benefits its members and the University.

This handbook outlines the club recognition program, tips on successful events and meetings, financial information, and programming ideas. It also includes several appendices containing policies, sample documents, and legal requirements.

Assuming a leadership position at a local level is a critical role in the Purdue Alumni regional club network. You are an integral part of the Purdue Alumni Association. Your leadership directly impacts the effectiveness of your club, drives the enthusiasm of your members, and contributes to the overall success of Purdue Alumni's mission.

We are dedicated to providing the tools necessary for you to be successful. This handbook is a useful guide to help you do that. If you have any questions, we are available to answer them as well as provide any assistance we can to help you run the best club in the Purdue network.

HAIL PURDUE!

Purdue Alumni Outreach Team

STATEMENT OF INTEGRITY

PURDUE ALUMNI ASSOCIATION SUPPORTS THE FOLLOWING PURDUE UNIVERSITY STATEMENT:

At Purdue, integrity is indispensable to our mission. We act with honesty and adhere to the highest standards of moral and ethical values and principles through our personal and professional behavior. We demonstrate our understanding of these values and principles and uphold them in every action and decision. Trust and trustworthiness go hand in hand with how we conduct ourselves, as we sustain a culture that is based upon ethical conduct. We expect our actions to be consistent with our words, and our words to be consistent with our intentions. We accept our responsibilities, share leadership in a democratic spirit, and subject ourselves to the highest standards of public trust. We hold ourselves accountable for our words and our actions.

We champion freedom of expression. To ensure our integrity, we safeguard academic freedom, open inquiry, and debate in the best interests of education, enrichment, and our personal and professional development. We embrace human and intellectual diversity and inclusiveness. We uphold the highest standards of fairness, act as responsible citizens, respect equality and the rights of others, and treat all individuals with dignity.

To fulfill our goals as a learning community, we insist that the objectives of student learning are not compromised. We treat all students equitably,

and our evaluations of learning achievements are impartial based on demonstrated academic performance. As students, we understand that learning is the most important goal and we embrace ethical values and principles, and reject academic dishonesty in all our learning endeavors. In the realm of new discoveries, we place the highest value upon truth and accuracy. We acknowledge the contributions of others. We place a higher value on expanding and sharing knowledge than on recognition or ownership.

We work diligently drawing from the strong work ethic of our state of Indiana and are committed to always acting in the best interests of the University. We pledge to make wise use of our resources and to be good stewards of financial, capital, and human resources. We operate within the letter and spirit of the law and prescribed policies, and strive to avoid impropriety or conflict of interest.

As members of the Purdue community, we demonstrate unyielding and uncompromised integrity in support of the highest standards of excellence for the University. As individuals, we all contribute to this Purdue standard of integrity as an exemplary model for all universities.

VOLUNTEER CONDUCT AND EXPECTATIONS

Volunteers are a critical part of the Purdue community. Participation in alumni clubs, networks, service projects, or any other alumni event requires individuals to act with integrity and respect for others. All alumni share a responsibility for Purdue's public relations — especially at the community level. Readiness to help with charitable, educational, and civic activities brings credit to Purdue's reputation.

As a volunteer (or club/network participant), I agree to support the mission of the Purdue Alumni Association and to contribute to a collegial, positive, and inclusive environment that does not discriminate on any basis.

COMMUNICATIONS

All correspondence is a reflection of the Purdue Alumni Association. Volunteers serving in leadership capacity with any Purdue Alumni Association club/network must make every effort to respond promptly and courteously to all proper requests for information and complaints.

All communications, written or otherwise, shall be conducted in a respectful manner. Inappropriate communication by email or in any public forum about Purdue Alumni Association, its volunteers, staff, stakeholders or any fellow alumni will not be tolerated.

PRIVACY AND CONFIDENTIALITY

When handling financial and personal information about alumni, participants in alumni activities, or others with whom the Purdue Alumni Association has dealings, observe the following principles:

- Collect, use, and retain only the personal information necessary for the alumni club/network business
- Retain information only for as long as necessary or as required by law
- Protect the physical security of this information
- Use only personal information for the purposes for which it was originally obtained
- Under no circumstances share or sell information obtained through a club/network or volunteer activity

VIOLATIONS OF CODE OF CONDUCT

Elected officers of any club/network will resolve issues in a professional and respectful manner. Volunteers or participants in club/network activities may be asked to leave an event or other public forum if their conduct is outside the expectations outlined in this document, and may be precluded from participation in the future.

CLUB PROGRAM

PURPOSE OF SANCTIONING CLUBS

To encourage diversity in programming, the current club program was implemented with expectations and clearly defined criteria for success. Our objective is to engage alumni, personally, professionally, intellectually to increase their connection to Purdue and each other.

Each year, groups must meet specific criteria in order to be sanctioned by the association. These requirements must be completed between July 1 and June 30, in alignment with the University's fiscal year. The group's Purdue Alumni staff liaison, with the group's assistance, will keep track of activity throughout the year. After June 30, club status is granted to those groups completing the requirements detailed below.

All sanctioned clubs must complete the annual requirements, plus organize a total of five events with at least one event in a programming category other than **personal**. All sanctioned clubs will receive the support provided by Purdue Alumni listed on pages 8–9.

ANNUAL REQUIREMENTS

To coordinate with the Purdue Alumni Association and to comply with University guidelines and federal law, there are several steps we require clubs to take. These are not meant to be onerous or time-consuming. Many of them will help us monitor all club engagement efforts and share best practices among clubs.

Below is a list of the requirements for all clubs. Some of them are one-time activities, while others are annual necessities.

1. SUBMIT WRITTEN CLUB AGREEMENT

(*Appendix A*) not to collect club dues, annual activity fees, etc. going forward. Collecting individual club dues, annual activity fees, etc. directly conflicts with the goal of increasing Purdue Alumni membership, which specifically supports our clubs.

2. SUBMIT WRITTEN CLUB AGREEMENT

(*Appendix A*) to adopt Purdue Alumni club online scholarship application and awarding timeline (only for clubs that maintain scholarship funds at Purdue University and select their own recipients). March 1 is the application deadline for students. April 15 is the awarding deadline for clubs. Purdue Alumni will provide the online scholarship URL for distribution and promotion in December.

3. SUBMIT DISCLOSURE AGREEMENT FOR STUDENT ADDRESSES (*Appendix C*).

4. SUBMIT PURDUE ALUMNI-APPROVED CLUB BYLAWS/CONSTITUTION (*in years changes made*).

5. INCORPORATE MEMBER/NONMEMBER PRICING for all fee-based events and follow pricing guidelines listed in *Appendix G*.

6. MAINTAIN A CLUB WEB PRESENCE with a community in the *Purdue Alumni Portal*, and/or Facebook page. Promote all club events on these sites and respond to inquiries posted within two business days.

7. PARTICIPATE IN ALL CAMPAIGNS organized by the Purdue Alumni Association. This could include, but is not limited to, membership campaigns, promoting Purdue Alumni initiatives via social media, and scholarship fundraising efforts like Purdue Day of Giving.

8. SUBMIT ROSTER OF CLUB OFFICERS. All must be Purdue Alumni members at the PLUS tier or higher.

9. SUBMIT A POST-EVENT INFORMATION FORM AND ATTENDEE LIST no later than one month after the event date. If your club has earned dues sharing, fill out the dues-sharing request portion of the form. Forms submitted more than one month past event date will not count as a qualified activity for the club recognition program or be eligible for dues sharing reimbursement. Submitting event information in a timely manner helps Purdue Alumni recognize and track overall monthly engagement. In addition, it builds an events library of ideas and best practices for all clubs to use and share.

MEMBERSHIP

The Purdue Alumni Association is a membership-based organization. We seek to develop and embrace emotional connections as a tool to encourage membership, while delivering value to our constituents through our membership program. Alumni club leaders are the greatest ambassadors that we have. It is paramount that we cultivate and grow a culture that understands that a strong financial stewardship program is key to our long-term success. Thus, alumni clubs play a significant role in promoting the value of membership to alumni in their respective areas and will be counted on to participate in membership campaigns organized by the Purdue Alumni Association.

RELATIONSHIPS

Relationships are at the very core of what we do. Our alumni clubs are an important part of the Purdue Alumni outreach and engagement team. Events should appeal to a wide variety of alumni interests. Our ultimate goal is to create exceptional experiences for our constituents by incorporating a high level of planning prior to events and engaging in critical self-evaluation after events. Clubs will be asked to plan virtual or in-person events, incorporating member/nonmember pricing, in the following engagement programming categories:

1. **PERSONAL** (e.g., social events, family-friendly events, game watches)
2. **PROFESSIONAL** (e.g., networking events, mentorship program, dinners)
3. **INTELLECTUAL** (e.g., special interest events, arts, lifelong learning, diversity events)
4. **SCHOLARSHIPS/STUDENT RECRUITMENT** (e.g., scholarship fundraiser, student recruitment/PART program, student retention, student send-off)
5. **SERVICE** (e.g., volunteerism)

The number and types of programming ideas for clubs are as diverse and varied as the clubs themselves. We encourage you to contact other club leaders for suggestions and ideas on how to get local alumni involved and connected with Purdue.

Submitting your event information, including attendee lists, to us in a timely manner after your event will help us to better understand and track overall monthly engagement, as well as help build an events library to share with other clubs in an effort to communicate best practices.

CLUB RECOGNITION

There are three tiers of recognition for clubs — Gold, Silver, and Bronze — based on the number of qualified events planned for the fiscal year (July 1–June 30).

Sanctioned clubs that meet the annual requirements will be awarded their Gold, Silver, or Bronze status at the annual Alumni Leaders Conference. After a year at Gold status, a club will receive a flag, personalized with the club name and the Purdue Alumni logo. Each year, any club that achieves Gold, Silver, or Bronze status will receive a “P” in the respective color each time they achieve this level.

GOLD, SILVER, & BRONZE AWARD REQUIREMENTS

	GOLD	SILVER	BRONZE
OPERATIONAL SUPPORT			
Incentive	must meet annual requirements \$500 operational support funds \$250 speaker reimbursement	must meet annual requirements \$500 operational support funds \$250 speaker reimbursement	must meet annual requirements \$500 operational support funds \$250 speaker reimbursement
DUES SHARING			
Incentive	\$2.50 per PA member	\$1.50 per PA member	X
SCHOLARSHIP			
Incentive	\$1,000 for scholarship account held at Purdue University or \$600 for scholarship account not held at Purdue University	\$500 for scholarship account held at Purdue University or \$300 for scholarship account not held at Purdue University	X
ENGAGEMENT (VIRTUAL OR IN-PERSON)			
Need to meet total events number and criteria below	Total Events = 8 must have at least one event per category	Total Events = 5 must have at least one event per category	Total Events = 5 must have at least one event in a category other than "Personal"
1. Personal e.g. social, family, sports	1	1	1+
2. Professional e.g. networking event, mentorship, Dinner for Boilers	1	1	1+
3. Intellectual e.g. special interest events, arts, lifelong learning, diversity event	1	1	
4. Scholarship and Student Engagement e.g. scholarship fundraiser, student recruitment, student retention, summer send-off	1	1	
5. Service	1	1	

DUES SHARING & SCHOLARSHIP DONATIONS FOR GOLD & SILVER CLUBS

Purdue Alumni offers the following support for sanctioned alumni clubs that earn Gold or Silver status for each fiscal year:

DUES SHARING

Each Gold club will receive \$2.50 per Purdue Alumni member in their club area for programming purposes. Each Silver club will receive \$1.50 per Purdue Alumni member in their club area. These funds are for programming purposes and are distributed as reimbursement for qualified expenses. Please refer to the Payment Request Form for dues-sharing procedures, as well as qualified expenses. See *Appendix A* and *Appendix F* for details.

SCHOLARSHIP DONATIONS

Each Gold club will receive a \$600–\$1,000 scholarship donation. Each Silver club will receive a \$300–\$500 scholarship donation. These funds are for scholarship programs and the amounts each Gold or Silver club receives depend on whether a club's scholarship account is held at Purdue University or elsewhere.

SUPPORT FOR SANCTIONED ALUMNI CLUBS

Sanctioned Purdue alumni clubs are an essential part of Purdue Alumni's mission. These groups keep people connected to each other and the University. Purdue Alumni offers sanctioned clubs operational support, provided that they meet our annual requirements.

• OPERATIONAL SUPPORT FUNDS

A \$500 check will be provided at beginning of fiscal year if the club has a bank account in the club's name. Otherwise, \$500 will be available on a reimbursement basis using the payment request form. In addition, a \$250 speaker reimbursement will be available to each club during each fiscal year. See *Appendix A* and *Appendix F* for details.

• STAFF LIAISON

A professional staff member is assigned to work with each club.

• ONLINE SERVICES

A variety of services are available to support your club, including the *Purdue Alumni Portal*,

club website hosting, email forwarding, events calendar on the Purdue Alumni website, and promotion on social media.

• CLUB PROMOTION

Club activities can be listed on the Purdue Alumni events calendar, mass emails, and Purdue Alumni media channels.

• EVENT BOX

Sent for social events or other designated events; includes name tags, brochures, pencils, Block P lapel pins, pom-poms, static clings, etc.

• SCHOLARSHIP PROGRAM

A staff liaison will assist with the scholarship process and serve as administrator between the club and the Division of Financial Aid. Purdue Alumni will also provide student email addresses to clubs to communicate club scholarship opportunities.

▪ **STUDENT RECRUITMENT**

Purdue Alumni will provide email addresses of prospective students to clubs to communicate scholarship opportunities and a link to the **PART program**, which includes materials for college fairs. For this program, Purdue Alumni staff will serve as liaison between the club and Admissions. See **Appendix C** for Disclosure Agreement for Student Addresses.

▪ **TAX IDENTIFICATION NUMBER**

Purdue Alumni will obtain a tax identification number so clubs can open a checking account, if requested.

▪ **ALUMNI LEADERS CONFERENCE (ALC)**

Free annual training conference held virtually every summer for alumni leaders and volunteers. For more information, visit purduealumni.org/alc.

▪ **CLUB HANDBOOK**

Online reference manual for club leaders.

▪ **LIABILITY INSURANCE**

Coverage available to clubs at no cost. Exceptions may apply if a club has incorporated themselves.

▪ **SPEAKERS**

When feasible and applicable, speakers can be provided for club events. The club is responsible for any speaker fees, as well as travel and accommodation expenses. If eligible, the club may use their speaker reimbursement funds.

▪ **GOLF**

Purdue Alumni's team will assist in promoting your golf outing and provide golf-specific giveaways for each participant. Purdue Alumni will secure participation of and provide transportation for invited guests, when feasible and applicable.

▪ **PURDUE ALUMNI CLUB AWARDS**

Boilermaker Pride Award and Club Recognition Awards

SANCTIONED CLUB WEBSITES

Purdue Alumni provides sanctioned clubs their own web page. All club pages maintain a common Purdue Alumni brand template. Information includes club bio, scholarship information, upcoming events, club contact information.

- The direct link to access is purduealumni.org/community/clubname, i.e. purduealumni.org/community/atlanta
- Purdue Alumni will oversee requested changes. To request a change, when logged into the club's page, click 'Request Change.' Or email alumnidigital@purdue.edu.

ALUMNI PORTAL

The *Purdue Alumni Portal* provides the following user benefits:

- Peer-to-peer networking
- Mentorship connections
- Job board
- Events information

Each club has its own community page in the Purdue Alumni portal to connect alumni within

your area. We recommend that your club designate someone to oversee administration of your community page, which includes promoting all club events and responding to posts within two business days. Both page maintenance items are requirements for maintaining status as a sanctioned club. We also encourage all alumni club volunteer leaders to create their own personal profile in the portal to help contribute to the robust digital network we strive to build.

PURDUE ALUMNI CLUB SCHOLARSHIP PROGRAM

Purdue Alumni encourages clubs to maintain their scholarship account at Purdue University for the following reasons:

- Donations can be made online at giving.purdue.edu.
- Helps ensure that controls are in place for proper handling of club funds.
- Donors receive recognition in the Purdue University gift-reporting system.
- An individual's donation is eligible for a federal tax deduction and an Indiana tax credit if it is made directly to the scholarship or endowment fund.
- Endowed accounts have a greater opportunity for growth.
- The Purdue Alumni Association provides \$1,000 to use for scholarship distribution to Gold Status clubs that have a scholarship account at the University. The alumni association provides \$500 for scholarship distribution to Silver Status clubs with a scholarship account at the University.

WHAT TYPES OF SCHOLARSHIPS ARE AVAILABLE?

1. ALUMNI CLUB SCHOLARSHIP ACCOUNTS

are available to clubs that expect to raise and award more than \$1,000 annually, or wish to be accumulating funds to establish an endowed scholarship. Clubs determine whether to have the Division of Financial Aid (DFA) or the club select recipients.

2. ENDOWMENT ACCOUNTS are available for clubs with a minimum deposit of \$25,000 (scheduled to change after 12/31/20). The University invests the money from endowment funds and income is distributed every on May 1 and November 1 based on the endowment amount on March 31 and September 30 and the University endowment policy. Endowment accounts have the potential to grow over time while providing funds to award scholarships.

3. THE PURDUE ALUMNI CLUBS SCHOLARSHIP

is a general fund administered by the Purdue Alumni Association. Clubs that do not expect to raise and award at least \$500 annually are encouraged to give to this fund instead of establishing their own scholarship fund. The DFA selects recipients.

HOW ARE CLUB CONTRIBUTIONS MADE?

Please make checks payable to the Purdue Research Foundation and mail them to the attention of your regional liaison at the Purdue Alumni Association.

DICK AND SANDY DAUCH ALUMNI CENTER

ATTN: (Regional Liaison Name)

403 West Wood Street

West Lafayette, IN 47907-2007

Alumni clubs can make contributions to their scholarship or endowment fund. Donations can also be made at giving.purdue.edu.

ARE SCHOLARSHIP CONTRIBUTIONS TAX DEDUCTIBLE?

If an individual donor writes a check or makes an online donation to Purdue Research Foundation (PRF), the gift is tax deductible and PRF will issue a donation receipt.

If an individual makes a scholarship donation to the club and the club in turns writes a check to the scholarship fund, the donation is not eligible.

If the club writes a check to their scholarship fund, the club will receive a donation receipt, but it will have no value for tax purposes.

WILL COMPANIES WITH MATCHING GIFT PROGRAMS MATCH GIFTS FOR THESE SCHOLARSHIPS?

Most companies with matching gift programs will match gifts for scholarships, provided the gift has been made directly to the institution of higher education. If an individual makes a check to Purdue Research Foundation or Purdue University, the company will likely match the gift.

Check this page at giving.purdue.edu for more information and to find out if your company has a matching gift policy.

HOW ARE SCHOLARSHIP RECIPIENTS SELECTED?

1. In instances where the Division of Financial Aid (DFA) selects recipient, the DFA bases selection on the written criteria provided in the club's scholarship agreement or endowment. DFA selects incoming freshmen after February 15. Selections for returning students are made after May 1.
2. If the club itself selects recipients based on written scholarship or endowment agreement, the club must use Purdue's Scholarship Universe for applications and abide by the Purdue Alumni club's awarding timeline.

CLUB-SELECTED SCHOLARSHIPS

Students can access Scholarship Universe at purdue.scholarshipuniverse.com. The applicant will need to search for the name of your club's scholarship.

AWARDING TIMELINE

- MARCH 1** | Application deadline
- MARCH 15** | Purdue Alumni shares qualified scholarship applications to clubs
- APRIL 15** | Deadline for clubs to select recipients and inform Purdue Alumni

The club may choose to rank recommendations. Please know we recommend that you select several alternatives in the event that one of the recipients elects not to attend Purdue.

Clubs can notify award recipients directly, but need to communicate with Purdue Alumni to ensure we place awards on the club's scholarship account in Scholarship Universe database.

WHO DECIDES HOW MANY SCHOLARSHIPS WILL BE AWARDED AND THE AMOUNT OF EACH?

In instances where the Division of Financial Aid (DFA) selects recipients, the DFA will determine selections based on scholarship or endowment criteria and the current amount in the scholarship fund.

If the club itself selects recipients, the club determines the amount and number of scholarships and must inform Purdue Alumni on both counts. If a club does not communicate recipient(s) and amount(s), Purdue Alumni or the DFA will select recipient(s) based on prior year's information and current balance of the scholarship fund. Club scholarships are typically \$500 or \$1,000, but can be upwards of \$2,500.

WHAT CRITERIA ARE COMMONLY USED TO GUIDE THE DIVISION OF FINANCIAL AID IN THE SELECTION PROCESS?

The club needs to establish selection criteria in writing prior to the creation of the scholarship account. Future changes are permissible for annual scholarships and must be in writing and submitted to the club's regional liaison by October 1. Changes to criteria in existing endowment agreements are more complex and time consuming due to the involvement of the Office of Planned Giving.

Please keep in mind the more layers of criteria used, the more difficult the selection process becomes. The following criteria (in any number of combinations) are commonly used:

• FINANCIAL NEED

The student must demonstrate need as determined on the Free Application for Federal Student Aid (FAFSA).

• MERIT

Generally refers to scholastic achievement, but could encompass other criteria such as leadership, work experience, volunteerism, etc. All scholarships generally require a minimum grade point average of 2.65 in a 4.0 system unless otherwise specified.

• LOCATION

Most clubs indicate the recipient is to be from the club's locality — either defined as an entire state, selected counties, or ZIP codes.

• YEAR IN SCHOOL

Clubs may designate their scholarship for incoming freshmen only, returning students, or both.

UNIVERSITY SPEAKERS AT CLUB EVENTS

University speakers can significantly enhance club events. Purdue Alumni is always open and willing to attempt to accommodate as many requests for speakers as possible. Unfortunately, scheduling and financial realities play a large part in Purdue Alumni's ability to secure a speaker for any given event. The Purdue Alumni Association cannot guarantee that we will be able to provide a speaker for every event planned by clubs. To give us every chance possible to secure a speaker, we ask clubs to follow this process:

1. Contact your Purdue Alumni staff liaison at least three months prior to an event.
2. When contacting Purdue Alumni, provide at least a first and second choice of speaker. If you are uncertain as to whom to invite, the club staff can assist in choosing a speaker that will suit the theme, demographics, and tone of the event.
3. In addition to a first and second choice of speaker, provide several specific, available dates

for the event. Please note that our speakers will NOT respond to requests for "any Tuesday in the summer." It MUST be a specific date.

4. Provide details regarding the event. For example, will it be a golf outing, or a picnic?
5. Please be patient! It may take several days for us to have any information to provide you; however, we will make every attempt to secure your first choice.

While it may seem easier to contact your first-choice speaker directly, we STRONGLY DISCOURAGE club leadership from extending the invitation. Just like you, University speakers are volunteers at club events. Purdue Alumni is respectful of time commitments and scheduling issues these speakers may have while maintaining a relationship. We ask that our clubs be equally respectful, by allowing the Purdue Alumni Association to handle the negotiation process.

PURDUE ALUMNI AWARDS PROGRAM

The following are awards given by the Purdue Alumni Association. A list of previous award winners is available on the Purdue Alumni website.

• **BOILERMAKER PRIDE AWARD**

Established in 2005, the *Boilermaker Pride Award* was introduced to recognize a club leader who has contributed time and service to the alumni club program and the Purdue Alumni Association over a period of time. Annual nominations are due May 1. Requirements include current or previous service as a club officer and being a current Purdue Alumni member. A special awards committee will select the winner and present him or her with a plaque at the Annual Alumni Leaders Conference. A nameplate will also be added to the plaque in the Purdue Alumni Association office. Click [here](#) for past recipients.

• **SPECIAL BOILERMAKER AWARD**

Established in 1981, the *Special Boilermaker Award* honors a member of the Purdue faculty or staff who has made significant contributions to improving the quality of life and/or the educational experience for Purdue students. Students, alumni, faculty, may submit a nomination. Annual nominations are due June 1. A University committee led by a Purdue Alumni staff member will select the winners, who are recognized during an on-field presentation at a Purdue home football game. A nameplate is added to a plaque in the Purdue Alumni Association office, as well as to a obelisk located on the Purdue Mall. Click [here](#) for past recipients.

PURDUE ALUMNI CLUB AGREEMENT

The following sets forth the terms and conditions of the agreement between the Purdue Alumni Association and Purdue Alumni Club of _____.

The parties agree to the following:

PURDUE ALUMNI ASSOCIATION WILL PROVIDE THE FOLLOWING:

- \$500 operational support funds per fiscal year
- Up to \$250 for speaker reimbursement per fiscal year
- Dues sharing will be paid in the 2021–22 fiscal year if club achieves Gold or Silver level in Club Recognition Program in 2020–21 fiscal year
- Scholarship donation will be made in 2021–22 school year if club achieves Gold or Silver level in Club Recognition Program in 2020–21 fiscal year

CLUB AGREES TO MEET THE FOLLOWING ANNUAL REQUIREMENTS:

- Will not collect club dues, annual activity fees, etc.
(Collecting individual club dues, annual activity fees, etc. directly conflicts with the goal of increasing Purdue Alumni membership, which specifically supports our clubs)
- Will adopt Purdue Alumni club online scholarship application and awarding timeline
(only for clubs that maintain scholarship funds at Purdue University and select their own recipients)
- Submit Disclosure Agreement for Student Addresses (**Appendix C**)
- Submit Purdue Alumni-approved club bylaws/constitution *(in years changes made)*
- Incorporate member/nonmember pricing for all fee-based events and follow pricing guidelines listed in **Appendix G**
- Maintain a club community in the *Purdue Alumni portal*, which includes posting all events and responding to inquiries posted to the community within two business days
- Participate in all campaigns organized by the Purdue Alumni Association *(e.g., membership campaigns, Purdue Day of Giving, etc.)*
- Submit roster of club officers - All must be Purdue Alumni members at the PLUS tier or higher
- Submit a **Post-Event Information Form** and attendee list no later than one month after the event date. If your club has earned dues sharing, fill out the dues-sharing request portion of the form. Forms submitted more than one month past event date will not count as a qualified activity for the club recognition program or be eligible for dues sharing reimbursement. Submitting event information in a timely manner helps Purdue Alumni recognize and track overall monthly engagement. In addition, it builds an events library of ideas and best practices for all clubs to use and share.

FOR \$500 OPERATIONAL SUPPORT FUNDS, CHECK ONE:

Our club has a checking account in its own name. Please send check, made payable to

_____, and mail to club treasurer,

CLUB NAME LISTED ON CHECKING ACCOUNT

_____, at _____

TREASURER'S FULL NAME

MAILING ADDRESS

Our club does not have a checking account in its own name. I understand that our \$500 operational support funds will be provided on a reimbursement basis.

ACCEPTED BY:

CLUB NAME DATE

CLUB PRESIDENT'S SIGNATURE CLUB PRESIDENT'S NAME PRINTED

PURDUE ALUMNI ASSOCIATION

COURTNEY MAGNUSON, SENIOR DIRECTOR OF ALUMNI OUTREACH DATE

VOLUNTEER CONFIDENTIAL FORM

The Volunteer Confidential Form is an agreement of the restricted nature of the information provided by the Purdue Research Foundation. It is required for access to certain alumni data from the Purdue Alumni Association and the Purdue Research Foundation.

Click [*here*](#) to access the Volunteer Confidential Form.

DISCLOSURE AGREEMENT FOR STUDENT ADDRESSES

The Purdue Alumni Association has access to addresses for incoming and current students who have applied or registered for classes on a Purdue University campus. This information is accessible to the Purdue Alumni Association as a University entity.

Purdue University and Purdue Alumni are required to comply with the Federal Educational Rights and Privacy Act (FERPA), a federal law that, among other things, prohibits widespread disclosure of personally identifiable information, such as student addresses.

Therefore, the alumni club president or a designee must have completed this form prior to requesting data from the Purdue Alumni Association. It can take one to two weeks for the information to be provided to the Purdue Alumni Association once we have made the request of Admissions and/or the Registrar. Once you receive this list, it:

1. Must only be used for the event/intention for which you requested it (*i.e. scholarship information, summer student send-off picnic*)
2. Must be used within two weeks of receiving list; otherwise, a new and updated list **MUST** be requested

As one of the annual requirements to be a club, ***you must sign this form and return*** it to the Purdue Alumni Association. You may email to your regional liaison, or mail to:

Purdue Alumni Association
 Attn: Your Regional Liaison
 Dick and Sandy Dauch Alumni Center
 403 West Wood Street
 West Lafayette, IN 47907-2007

I agree to adhere to the law (FERPA) and respect the privacy, sensitivity, and two-week lifespan of the list

provided to me as a representative of the Purdue Alumni Club of: _____

Name: _____ Club Position: _____

Address: _____

Email: _____ Phone: _____

Signature: _____ Date: _____

EVENT CHECKLIST AND BUDGET ESTIMATE SHEET

Planning an event? Whether it is online or in person, consult the below information on how to get started.

EVENT PLANNING CHECKLIST

12 WEEKS PRIOR

- Confirm the event date with Purdue Alumni
- Assign volunteer responsibilities
- Establish budget
- Calculate per-person event costs; incorporate member/nonmember pricing

10 WEEKS PRIOR

- Select and reserve location. Things to consider:
 - Convenient and adequate parking
 - Acceptable billing arrangement
 - Appropriate venue size
 - A/V equipment, if needed
- Set menu and arrange for bar service, if appropriate

8 WEEKS PRIOR

- Determine event staffing needs (e.g., set-up/clean-up assistance, guest book and/or name tag table attendant, food servers, etc.)
- Notify your regional liaison of any special needs

6 WEEKS PRIOR

- Submit pre-event information online for promotional support
- Order/purchase door prizes and other supplies

3-4 WEEKS PRIOR

- Purdue Alumni sends email for event

ONE WEEK PRIOR

- Prepare registration materials and name tags
- Provide final count to facility managers and caterers, as needed

AFTER THE EVENT

- Mail thank-you notes to participants and/or helpers
- Send post-event survey to attendees via email
- Send list of attendees to Purdue Alumni

EVENT BUDGET ESTIMATE SHEET

Organized by _____

Telephone _____ (daytime) _____ (evening)

Mailing address _____

Email address _____

Event name _____

Purpose _____

Target audience _____

Date _____ Time _____

Location/Venue _____

Expected attendance _____

Admission price: \$_____ Purdue Alumni members \$_____ Non-members

ESTIMATED TOTAL INCOME: \$_____

PROJECTED EXPENSES:

Facilities/room rental charges \$ _____

Set-up charges/fees \$ _____

Rental equipment (*includes audio-visual, tents, risers, tables, chairs, etc.*) \$ _____

Food \$ _____

Beverages \$ _____

Bartender fees/gratuities \$ _____

Promotional materials (*signage, programs, flyers, etc.*) \$ _____

Decorations \$ _____

Entertainment \$ _____

Transportation \$ _____

(*includes buses, vans, parking, valets, and gratuities for drivers, etc.*)

Miscellaneous \$ _____

(*includes plaques, photos, speaker travel/expenses, and supplies, etc.*)

ESTIMATED TOTAL EXPENSES: \$ _____

OTHER ALUMNI VOLUNTEERS WHO WILL ASSIST WITH THE EVENT:

1) _____ 2) _____

3) _____ 4) _____

5) _____

AUCTIONS AND RAFFLES AS FUNDRAISERS

Many alumni clubs utilize raffles and auctions as a tool to raise money for their local scholarship effort. Below are some suggestions and tips for each of these programs:

RAFFLES

- In general, raffles raise less money than auctions; for example, attendees might buy \$20 worth of raffle tickets, but much more money can be raised by auctioning an item such as a football helmet or autographed ball

SILENT AUCTIONS

- A minimum bid should be provided
- The bidding list should include name, phone number, and bid amount
- A five-minute warning should be offered for bids to close
- Have the treasurer or appointee ready to accept money from winners

LIVE AUCTIONS

- Display the items before the auction, including minimum bid
- Extra information about the item can help increase the price
- Give the item to the winner at the time he/she wins the bid
- Have an officer or treasurer write down the name of the winner and the winning price during the auction
- Collect money immediately after the item is sold

ONLINE AUCTIONS

- Consider an online / virtual auction as a way to help fundraise for your club scholarship
- Purdue Alumni staff will guide you to understand the necessary steps and best practices for an online auction

Signed balls from Purdue University athletics teams to use as auction items can be purchased directly from the athletic department. Allow 2–3 months to have your order filled. You are allowed to purchase as many balls as you like. Custom autographs are possible; you can make all special requests on the *order form*.

Purdue Alumni will not support an activity in which a charity gaming event is conducted. That means Purdue Alumni will not assist with notifying alumni about the activity, promoting the activity, organizing the activity, and will not allow any revenue sharing funds to be used for the activity. Charity gaming includes, but is not limited to, casino games, poker, pull tabs, punchboards, and tip boards. Purdue Alumni will not support these events.

SPEAKER REIMBURSEMENT

The Purdue Alumni Association will reimburse alumni clubs for speaker fees, travel, and/or accommodations up to \$250 per club per fiscal year (July 1–June 30). To be eligible, alumni clubs must meet all annual requirements outlined in the club handbook.

QUALIFYING SPEAKERS INCLUDE

- Current or former Purdue students
- Purdue alumni
- Current or former Purdue faculty/staff members

Reimbursement requests not meeting the criteria listed above should be directed to your regional liaison before securing the speaker. All decisions are at the regional liaison's discretion.

THE FOLLOWING DO NOT QUALIFY FOR SPEAKER REIMBURSEMENTS

- Prospective or current Purdue student-athletes
- Purdue Pete
- Club leaders or their immediate family members

THE FOLLOWING ARE CONSIDERED ELIGIBLE EXPENSES

- Speaker fees
- Airfare
- Hotel room
- Shuttle, taxi, or vehicle rental, from airport to event site
- Mileage allowance for use of personal vehicle

You can request reimbursement as part of the post-event information form. Please attach receipts to the post-event form. This form must be completed within one month of the event.

MEMBER AND NONMEMBER PRICING GUIDELINES

OBJECTIVES

1. Grow membership
2. Increase revenue for Purdue Alumni and its clubs/networks
3. Establish consistency, where practical, in pricing across clubs/networks

STRATEGIES

1. Implement member and nonmember pricing for all fee-based events
2. Establish sufficient gap between member and nonmember pricing to provide a strong incentive for nonmembers to consider becoming members, even if at only the BASIC Membership level
3. Set member pricing at sufficient level to reflect the value delivered to attendees, not simply to cover actual event costs

RECOMMENDED UPCHARGE FOR NON-MEMBERS*

IF MEMBER PRICE IS...	NONMEMBER PRICE SHOULD BE MEMBER PRICE PLUS...
Free**	+\$10
Between \$1 and \$49	+\$10
Between \$50 and \$74	+\$15
Between \$75 and \$99	+\$20
Between \$100 and \$149	+\$35
Between \$150 and \$199	+\$50
More than \$200	+\$60

* Member can bring one guest at the member price; additional guests pay the nonmember price (or for family-oriented events, you could allow member pricing for member and immediate family members).

** It is highly recommended to avoid free events (with the exception of game watches and community service events), if possible. Consider a \$5 or \$10 member price and indicate that proceeds will support the club's/network's scholarship fund and/or local programs.

Note: Promote the fact that memberships start at only \$25. Even the \$25 BASIC membership entitles member to discounted member pricing.

PLANNING ONLINE EVENTS

Whether using Zoom, WebEx, or some other platform, planning for your event can help ensure its success.

BEFORE THE EVENT

- Schedule a planning session with your presenter(s) and identify the following:
 - Purpose: What content/message do you want to provide?
 - Intended audience: To what group of people will this appeal?
 - Format: Depending on the content, the skill of the presenter(s), and the audience needs, decide if the presentation will be a panel, an interview, or a webinar presentation. Will you (or someone) serve as a copresenter? Will you simply provide an introduction and help with Q&A at the conclusion?
 - Resources: What platform will you use? Each virtual presentation platform has its own features and strengths.
 - Will you need breakout rooms?
 - Will you use PowerPoint slides?
 - Will you visit websites or bring up documents?
 - Know ahead of time what you would like to use so that you can determine how easy it is to switch between resources throughout the presentation.
 - Recording and Sharing: Determine ahead of time if it is appropriate to record the presentation and make participants aware at the beginning of the event.

- Conduct a run-through ahead of the presentation. This allows you to learn how to use platform features, refine the presentation, ensure smooth transitions, and work out any issues ahead of the event. Some specific things to consider are:
 - Event hosting: Will this be you or will you share the role with your presenter(s)? Many platforms allow you to share or hand off hosting capabilities.
 - Introduction: Will you introduce the presenter(s)? Will you do an overview of the Purdue Alumni Association or your club?
 - Managing the resources: Who will share the slide deck/website, etc.? If you are screen sharing, you may not be able to manage the chat area unless you use a second screen or another device such as a tablet or cell phone.
 - Audience interaction: Will you mute participants upon entry when setting up the event? Will your presenter(s) want to address questions throughout the program or at the end? Make sure someone is monitoring the chat during the event to ensure questions and/or technical issues are addressed.

DURING THE EVENT

- Arrive 15–30 minutes ahead of the presentation: This allows you to check that everything is set up properly including your slide deck and cohosting features.
- Greet your attendees as they enter the event: Typically, you will see their names and can greet them by name. You also may ask them icebreaker questions to which they can respond in the chat area.
- Prior to the official start:
 - Remind everyone to remain muted. Mention how to use the chat area.
 - Mute yourself when you are no longer presenting so that you do not contribute to unwanted background noise.
- The introduction:
 - Welcome everyone to the event and provide a few "housekeeping" details such as when Q&A will occur and how to use the chat, whether the presentation will be shared after the event, etc.
- Have fun and enjoy the event.
 - Don't panic! If there is a mishap of some kind, do your best to remain composed. Your audience members know that technology is not always perfect.
 - If your session is disrupted, reboot the session as quickly as possible and welcome participants back as they start to rejoin.

- Conclusion
 - Thank your presenter(s) and audience.
 - Announce any upcoming events, useful resources, how you will follow up with participants, and how to contact you with any follow-up questions.

POST-EVENT

- Follow up with the presenter(s) and attendees: Thank presenters and attendees; consider if you want to attach a survey for the attendees or have a debriefing session with the presenter(s).
- Note the numbers: How many registered? How many attended? How long did attendees stay engaged? Depending upon your registration fields (if you had registration), you may have additional data that could be useful and shared.

SAMPLE ALUMNI INTEREST SURVEY

Dear Purdue Alumni and Friends:

The following questionnaire has been designed to solicit your feedback and collect your ideas about the possibility of establishing a Purdue Alumni Club in **(Location)**. Thank you in advance for taking a few minutes to complete and return this questionnaire by **(Date)**. We look forward to receiving your comments, and remain convinced that forming a club would promote Purdue University and the Purdue Alumni Association through involvement and support of local community activities and would provide opportunities for networking among alumni, friends and students.

Do you agree that a Purdue Alumni Club should be formed in **(City/Town)**?

Yes No

Listed below are several types of programs and activities that have been successfully sponsored by other clubs and/or might be offered by a Purdue Alumni Club of **(City/Town)**. Please check those which interest you. Use the space provided to write in any other suggestions.

- Annual social
- Local TV viewing of athletic events
- Family-style picnic/barbeque
- Golf outing
- Back-to-school send-off with new and returning students
- Community service work
- Tent/display at local fairs
- Block ticket purchase for the club at a Purdue athletic event
- Joint activity with other Purdue Alumni Club(s) - specify _____
- Joint activity with other local Big Ten alumni club(s) - specify _____
- Raise funds to award scholarship(s) to deserving local Purdue students
- Other: _____

If this club is formally organized, how often would you expect it to hold meetings or events similar to those listed above? Check one:

- Once per year
- Twice per year
- Three times per year
- Four times per year
- Five times per year
- More than five times per year

How often do you believe you might attend these club-sponsored meetings or events? Check one:

- Once per year
- Twice per year
- Three times per year
- Four times per year
- Five times per year
- More than five times per year

Are you interested in serving on a steering committee to help establish this club?

Yes No

Name: _____

School/Year: _____

Address: _____

Home or cell phone: _____ Work phone: _____

E-mail address: _____

Are you and/or your spouse currently members of the Purdue Alumni Association? If "Yes", specify name and school/year.

Yes No Self: _____

Yes No Spouse: _____

PLEASE RETURN TO:

Name:
Address:
Phone:
Email:

AGREEMENT TO MAINTAIN FUNDS FOR PURDUE ALUMNI CLUB

The Purdue Alumni Club of _____ has requested the club be considered inactive, and has asked the Purdue Alumni Association maintain its current cash balance totaling \$_____ until the club becomes active again. The club and Purdue Alumni agree:

- 1. Club will issue a check payable to the Purdue Alumni Association for all funds currently held by the club.
- 2. Purdue Alumni will maintain a separate account for the club's funds, and will not co-mingle those funds with other Purdue Alumni funds.
- 3. Club funds will not earn interest while held by Purdue Alumni.
- 4. Purdue Alumni will not pay any entity or individual with whom club may have a business relationship, even if requested to do so by club.
- 5. Purdue Alumni will return the funds to the club when the club provides Purdue Alumni staff with proof they have met the guidelines for active clubs as outlined in the Alumni Club Handbook.

CLUB PRESIDENT'S SIGNATURE

DATE

COURTNEY MAGNUSON, SENIOR DIRECTOR OF ALUMNI OUTREACH

DATE



HOLDING EFFECTIVE CLUB BOARD MEETINGS

1. Publish and distribute an agenda at least one week ahead of the meeting.
2. Follow pre-determined agenda (sample template below).
3. Ensure that all members can participate.
4. Ensure clear understanding of follow-up assignments.
5. Provide minutes to all club officers and board members in a timely fashion following the meeting.

SAMPLE CLUB BOARD MEETING AGENDA

Name of Your Alumni Club

Date of Location

Time of Meeting

AGENDA

1. Call to Order
2. Approval of Previous Meeting Minutes
3. Introduction of any guests
4. Updates on any upcoming events or items of interest from any board members
5. Discussion of any old business
6. Membership update
7. Planned events or programming
8. Scholarship applications/process/decisions
9. Treasurer's update
10. Discussion of any new business
11. Adjournment

PURDUE ALUMNI CLUB CONSTITUTION TEMPLATE

ARTICLE 1 // NAME

The name of this organization shall be the Purdue Alumni Club of _____ (hereafter referred to as "the club"). The club area consists of (list the major city from which we'll draw a 50-mile radius or specific county/counties).

ARTICLE 2 // PURPOSE

The purpose of the club is to promote Purdue University and the Purdue Alumni Association through involvement and support of local community activities; and to provide opportunities for networking among alumni, friends and students.

ARTICLE 3 // MEMBERSHIP

Membership in the club is open to any graduate of any campus of Purdue University, and any person who has attended Purdue events or who wishes to support Purdue.

ARTICLE 4 // FEES

The club will not collect dues or an annual activity fee. The club may collect a fee to help offset expenses of a specific club function.

ARTICLE 5 // DIRECTORS AND OFFICERS

The board of directors shall be responsible for establishing policies and conducting the business of the organization. The membership of the club shall elect the board and officers. The board will consist of not more than (odd number) persons, which shall include the president, vice president, secretary, treasurer and, where possible, a risk manager. The board may add other positions deemed necessary to ensure the efficient operation of the organization.

The following officers shall serve the club.

PRESIDENT

The president will preside at all meetings and will serve as the chief executive officer of the club and shall serve a term of (# of years) years.

VICE PRESIDENT

The vice president will serve in the absence of the president and shall serve a term of (# of years) years. The vice president will also serve on committees as appointed by the president.

SECRETARY

The secretary will record the minutes of all meetings, preserve all written reports, keep an active official list of club participants, and shall serve a term of (# of years) years.

TREASURER

The treasurer will be responsible for handling money, receipts and payment of bills for the club. The treasurer shall communicate to the club membership in writing the club's financial status at least once per year and initiate an annual review of finances following the end of each fiscal year. The treasurer shall serve a term of (# of years) years.

RISK OFFICER

The risk officer will be responsible for implementing and assuring compliance with loss prevention practices established by the Purdue Alumni Association. One of the officers above may assume this role/task or be combined with another position within the club.

To be eligible to serve as an officer of the club, an individual must be a current member of the Purdue Alumni Association.

A nominating committee will be appointed by the club president to bring forth names for all elections. A maximum of (# of terms) consecutive terms for the same office may be served by any individual.

In the event an officer vacancy occurs in the middle of a term, the president may appoint any member as successor to hold office for the remainder of the unexpired term. A majority of the club's board of directors must vote to affirm this selection.

ARTICLE 6 // MEETINGS

Business meetings shall be held at least once each year and at such additional times as the board of directors shall deem necessary. A good faith effort shall be made to notify all club members thirty (30) days prior to holding such meetings. A quorum of (# of people, recommend 10-15) attendees is needed to conduct business. One meeting each year shall be designated as the annual meeting for the election of officers and directors. Roberts Rules of Order on parliamentary procedure shall govern the conduct of each meeting. The club's operating year shall mirror the Purdue Alumni Association's fiscal year, July 1- June 30.

ARTICLE 7 // AMENDMENTS

This constitution may be amended only at a regularly scheduled meeting by a 2/3 majority vote of the board of directors. Amendments must have been proposed at a previously held meeting and shall be included with the meeting notice, referenced in Article Six. Amendments must also be approved by the Purdue Alumni staff.

ARTICLE 8 // ADOPTION AND APPROVAL

The constitution shall be adopted upon its approval by a majority vote of the alumni in attendance at a club meeting for that specific purpose and requires the approval of the Purdue Alumni staff. All alumni in the club area are to be notified at least 30 days prior to this meeting.

Following approval, the club is formally established by its addition to the official Purdue Alumni club directory. The alumni association will provide the club president with an approved copy of the constitution.

ARTICLE 9 // DISSOLUTION

The club may be dissolved for one of the following reasons:

- The board of directors of the local club notifies Purdue Alumni in writing of its desire to dissolve.
- The club fails to have an activity for two consecutive years following the date of the most recent activity reported to Purdue Alumni.
- The club does not fulfill the purpose stated in Article Two.

The board of directors of the local club shall notify Purdue Alumni in writing of its intent to dissolve.

After the club has been dissolved, other individuals wishing to organize a club in this geographic region may do so through the adoption of a new constitution.

Any assets accumulated by the club will be forwarded to the Purdue Alumni Association. See *Appendix K* for Agreement to Maintain Funds for Purdue Alumni Club.

TREASURER'S TO-DO LIST

Here are some steps to take to establish the financial foundation of a club.

1. Apply for a federal tax identification number
2. Set up a checking account with the official club name
3. Reconcile the bank statement each month
4. Consider requiring two signatures on all checks
5. Deliver quarterly financial report to the other club officers
6. An annual review of the financial records should be conducted by someone other than the treasurer
7. Prepare a budget for upcoming year
8. Deposit scholarship money in a separate bank account (e.g., a savings account)

SAMPLE FINANCIAL REPORT

	AMOUNT	BALANCE
07/01/17	\$2,000.00	\$2,000.00
09/01/17 Catering (50 people x \$30/dinner)	(\$1,500.00)	\$500.00
09/15/17 Decor	(\$50.00)	\$450.00
09/25/17 Auction Items	(\$200.00)	\$250.00
10/01/17 Fall Dinner (50 people x \$30)	\$1,500.00	\$1,750.00
11/07/17 Dues Sharing Reimbursement	\$250.00	\$2,000.00
03/15/18 Greens Fees (40 people x \$50)	(\$2,000.00)	\$0.00
05/15/18 Catering (40 people x \$20/lunch)	(\$750.00)	(\$750.00)
06/15/18 Spring Gold Outing	\$2,500.00	\$1,750.00
06/30/18	\$1,750.00	\$1,750.00

LIABILITY INSURANCE COVERAGE

The Purdue Alumni Association provides liability insurance coverage to alumni groups and their volunteer leaders for those participating in the alumni club program. Coverage is provided for bodily injury and property damage resulting from club events or activities, and for personal injury other than bodily injury. There is no cost to clubs to receive the liability insurance coverage. Coverage is provided to clubs located in the U.S. (including Puerto Rico) and Canada. Exceptions may apply if a club has incorporated themselves.

Clubs should be aware that the liability coverage purchased contains standard exclusions found in most commercial liability policies. A few of those exclusions are of particular importance and are highlighted below:

ALCOHOL

Coverage is not provided if the insured distributes, sells, serves, or furnishes alcoholic beverages. Clubs should use a licensed caterer/bartender with liquor liability coverage if alcohol is going to be served.

ATHLETICS

Coverage is not provided for a person injured while taking part in athletics. Athletics include, but are not limited to, activities such as golf, softball, volleyball, basketball, bowling, etc.

CONTRACTUAL LIABILITY

Coverage is not provided for liability assumed by contract.

EXPECTED OR INTENDED INJURY

Coverage is not provided for an activity in which an injury could be expected or is intentionally caused.

AIRCRAFT, AUTO OR WATERCRAFT

Coverage is not provided for any claims arising out of the use of aircraft, automobiles, or watercraft.

RISK OFFICER DUTIES

The risk officer of each club, is expected to implement and monitor the following practices:

- If alcohol is going to be served, hire a licensed caterer/bartender with liquor liability coverage to do all serving.
- Since coverage is not provided for an injury while taking part in athletics, the club should request all participants in athletic endeavors sign a waiver that releases Purdue University, The Trustees of Purdue University, the club, as well as the Purdue Alumni Association, its insurers and those organizing the event of any liability. Use the waiver form on the next page. Waivers should be retained by the club for at least two years following an event.
- Refrain from assuming liability in any contract. This would include assuming liability in any facility lease agreement where the club is asked to indemnify the facility owner for premises liability losses where the club has no control over premises maintenance or the general condition of the premises.
- Part of effective risk management involves confirming that third parties you do business with are financially responsible if their services cause or contribute to an insurance claim. Obtaining a Certificate of Insurance will help assure this by providing evidence of insurance.
- The risk officer would also have waiver forms available for events not covered by the Purdue Alumni insurance policy.
- This officer would also be responsible for filling out an Accident Reporting and Investigation form (*Appendix I*) in case of an accident at a club event.

Some venues may request the club provide a "Certificate of Insurance". If the club is requested to provide a certificate, contact your club liaison at least seven days prior to needing the certificate.

WAIVER, RELEASE, AND HOLD HARMLESS AGREEMENT

In consideration of my participation in the _____ (the "Activity"), I represent, covenant, and agree as follows:

I acknowledge that participating in the Activity involves certain risks (some of which I may not fully appreciate) and that injuries, death, property damage, or other harm could occur to me or others. I accept and voluntarily incur all risks of any injuries, damages, or harm which arise during or result from my participation in the Activity, regardless of whether or not it was caused in whole or in part by the negligence of the Purdue Alumni Club of _____, Purdue University, The Trustees of Purdue University, Purdue Alumni Association, and their insurers, departments, leaders, affiliates, employees, trustees, officers, agents, volunteers ("Released Parties").

I waive all claims against any of the Released Parties for any injuries, damages, losses, or claims, whether known or unknown, which arise during or result from my participation in the Activity, regardless of whether or not caused in whole or part by the negligence or other fault of any of the Released Parties. I release and forever discharge the Released Parties from all such claims.

I agree to indemnify and hold the Released Parties harmless from all losses, liabilities, damages, costs or expenses (including but not limited to reasonable attorneys' fees and other litigation costs and expenses) incurred by any of the Released Parties as a result of any claims or suits that I (or anyone claiming by, under or through me) may bring against any of the Released Parties to recover any losses, liabilities, costs, damages, or expenses which arise during or result from my participation in the Activity, regardless of whether or not caused in whole or part by the negligence or other fault of any of the Released Parties.

I have carefully read and reviewed this Waiver and Release Agreement. I understand it fully and I execute it voluntarily.

PRINTED NAME

SIGNATURE

DATE

ACCIDENT REPORTING AND INVESTIGATION FORM

Date injury occurred: _____ Time occurred: _____

PERSONAL CONTACT INFORMATION OF PERSON INJURED

Name: _____

Address: _____

Phone: _____ E-Mail: _____

Location of incident: _____

Describe what happened:

Describe apparent injury:

Was an ambulance or police called? Yes No

Name/ Phone Number/Address of any witnesses (if known):

Form Completed by: _____ Date: _____

COMPLETE IMMEDIATELY AND EMAIL YOUR REGIONAL LIAISON OR MAIL TO:

Your Regional Liaison
 Dick & Sandy Dauch Alumni Center
 403 West Wood Street
 West Lafayette, IN 47907

ALUMNI OUTREACH STAFF



COURTNEY MAGNUSON (M'04, MS HHS'06)
SENIOR DIRECTOR, ALUMNI OUTREACH

cmagnuson@purdue.edu



NATALIE EVANS (T'02)
ASSISTANT DIRECTOR, REGIONAL OUTREACH (SOUTH US)

ngevens@purdue.edu



TREVOR FOLEY (MS EDU'17)
DIRECTOR, INTERNATIONAL OUTREACH AND GLOBAL ALUMNI AMBASSADOR

trevorfoley@purdue.edu



SHARETHA MARSHALL
ASSISTANT DIRECTOR, REGIONAL OUTREACH (EAST US)

sharetha@purdue.edu



KIM RINGLER
ADMINISTRATIVE ASSISTANT

kringle@purdue.edu



MARIA WHIPPLE
ASSISTANT DIRECTOR, REGIONAL OUTREACH (MIDWEST AND WEST COAST US)

whipple@purdue.edu