



Purdue Alumni Club Volunteer & Financial Policies Agreement

July 1, 2024-June 30, 2025

The following sets forth the terms and conditions that sanctioned alumni clubs for the Purdue for Life Foundation will adhere to in order to represent the vision and mission of Purdue University in their area. Failure to adhere to the terms and conditions may affect the club's funding and other support resources offered by the foundation.

The Purdue Alumni Club of _____ agrees to abide by the
NAME
following requirements:

- Submit annually, a signed Purdue Alumni Club Volunteer and Financial Policies Agreement.
- Submit annually, a club leadership roster that includes all officers, board members, and committee members. This allows the foundation to communicate consistently with all members and code volunteers accurately.
 - Club Leadership Roster Link: <https://www.purdueforlife.org/alumni-leaders/clubs/alumni-club-leadership-roster/>
- Each club officer, board member, and committee member will maintain an annual membership in the Purdue Alumni Association, dues of which directly support club activities via engagement funds and scholarship donations. We cannot expect alumni and donors to be members if the example of membership is not upheld by all volunteers involved with a club board.
 - PAA Membership Link: <https://connect.purdue.edu/s/membership>
- Each club officer, board member, and committee member will complete the Purdue for Life Foundation Statement of Integrity & Volunteer Conduct and Expectations. This is completed by all volunteers for the Purdue for Life Foundation.
 - Statement of Integrity & Volunteer Conduct and Expectations Link: <https://www.purdueforlife.org/alumni-leaders/clubs/alumni-leader-integrity-conduct-expectations/>
- Board members and officers will adhere to the following terms and term limits. If there is a concern that enforcing this policy will result in a role(s) going unfilled, the Purdue for Life Foundation will work directly with the club in a more intentional manner to conduct outreach and recruitment activities together.
 - The length of a term can be 2-4 years for board members, committee members, and board officers.
 - A person may serve no more than two terms, back-to-back, before having to vacate the board for the length of one term.
- Host a minimum of three events annually and communicate through email and social media to your constituents. Qualification for the recognition program requires at least three events. Game watches can count no more than twice towards the total number of events.
- Direct all email communication through PFLF email systems. This enables the Purdue for Life Foundation to collect data on who receives emails, open rates, click rates, and more. Some of this data (excluding contact information) may be shared with club leaders upon request to help enhance communication efforts. Clubs may not keep their own list of emails to conduct mass



outreach for their events. This does not mean that individual club leaders cannot forward an email on to contacts they have in the area, be it friends, colleagues, business partners, etc. Additionally, clubs do have the option to maintain their own social media presence.

- Email & Event Request Form: <https://www.purdueforlife.org/alumni-leaders/clubs/club-email-and-event-forms/>
- Use PFLF's event registration system for all event payments and registrations. This allows the Purdue for Life Foundation to collect data on who attends events, what types of events they attend, how often, and more. Some of this data (excluding contact information) may be shared with club leaders upon request to help enhance events and programs. PFLF will share registration lists with club leadership prior to each event. Payment at the door and for scholarship donations at an event, especially when conducting an auction, may be taken via cash, check, and/or card-swipe technology at the preference of the club.
 - Email & Event Request Form: <https://www.purdueforlife.org/alumni-leaders/clubs/club-email-and-event-forms/>
- Abstain from utilizing other event registration systems. We cannot protect constituent data when other systems are utilized.
- Abstain from keeping mass lists of contact information of alumni and constituents. Any data you come in contact with as a result of your role as a volunteer for the Alumni Clubs program is the property of the Purdue for Life Foundation. This is to protect alumni and constituent data and keep compliance with Purdue for Life Foundation data policies.
- For events where speakers are needed, clubs are encouraged to find a speaker that can relate to a large and diverse audience. To request Purdue for Life Foundation staff, Purdue Alumni Association board members, and the Purdue for Life Foundation CEO, utilize the speaker request form.
 - Speaker Request Form: <https://www.purdueforlife.org/alumni-leaders/clubs/speaker-request/>
- Establish a social media presence utilizing correct and updated Purdue for Life Foundation branding. The foundation encourages the use of Purdue Ties, our networking and mentoring platform for all of Purdue University.
 - Purdue Ties: www.purdueties.com
- Use PFLF-branded club logos, graphics, and other communication materials for all communications and promotional materials at events.
- Keep an updated webpage through the Purdue for Life Foundation utilizing our Web Page Updates Form.
 - Webpage Updates Form: <https://www.purdueforlife.org/alumni-leaders/clubs/club-webpage-update-request/>
- Abstain from hosting other webpages outside of your authorized webpage with the Purdue for Life Foundation. We cannot protect constituent data when other systems are utilized.
- Utilize club funding, either from the foundation or raised locally, in a responsible way. Club funds are meant to be used to engage alumni and other constituents. Funding to clubs is made possible through Purdue Alumni Association membership fees and donations. We manage this money that has been generously provided by our constituents for the betterment of Purdue University. Staff and volunteers should exercise the highest level of responsibility in the management of these funds. We encourage clubs to spend these engagement funds for the purpose of engaging alumni and friends in their geographic areas. If at the end of the year your club leadership decides that there is too much money left over, we encourage the club to



consider making a donation to their club scholarship account, or if they do not have one, the Purdue University general scholarship fund.

- Submit a quarterly financial report which includes bank statements from the previous three months and a document outlining each transaction and its purpose.
 - Quarterly Financial Report Form: <https://www.purdueforlife.org/alumni-leaders/clubs/alumni-club-quarterly-financial-report/>
- Abstain from collecting club dues, annual activity fees, etc., in exchange for engagement funds.
- Adhere to all financial policies in Addendum A below.
- Make a concerted effort to send at least one board member to ALVC, the Alumni Leaders & Volunteers Conference, hosted annually by the Purdue for Life Foundation.
- Make a concerted effort to have at least one board member attend the monthly club leaders forum, hosted by the Purdue for Life Foundation.

In order to support our clubs' efforts to represent the vision and mission of Purdue University, the Purdue for Life Foundation will provide the following:

- Staff support in the form of trainings, individual consultations, pre-payment for events, speaking engagements, and other assistance.
- Engagement funds for the current fiscal year, if the club achieved Gold, Silver, or Bronze level in the club recognition program for the previous fiscal year.
 - Gold=\$2.50 per PAA member in the club's geographic zip code area + \$500 in operational funds
 - Silver=\$1.50 per member + \$500 in operational funds
 - Bronze=\$500 (flat amount)
- Scholarship donation if the club achieved Gold or Silver level in club recognition program.
 - Gold=\$1,000 (\$500 for clubs that have accounts outside of PRF)
 - Silver= \$600 (\$300 for clubs that have accounts outside of PRF)
- Email distribution to alumni, students, and friends in the club's geographical area.
- Use of PFLF's online auction platform, BidPal.
- Promotional materials and staff support for events.
- Marketing and registration support for events.
- Club website and support.
- Programming, fundraising, and stewardship support for scholarship programs.
- Online guidance and resources for board members and other volunteers.
- Ongoing club leader training and communications.
- PFLF- and university-branded items and give-a-ways for events.
- PFLF- and university-branded webpages that clubs can help provide content for.
- PFLF- and university-branded assets/logos for webpages, emails, and social media accounts.



ACCEPTED BY:

ALUMNI CLUB NAME

CLUB PRESIDENT'S NAME

CLUB TREASURER'S NAME

CLUB PRESIDENT'S SIGNATURE

DATE

CLUB TREASURER'S SIGNATURE

DATE

PURDUE FOR LIFE FOUNDATION:

A handwritten signature in black ink that reads 'Jimmy M. Cox'.

SIGNATURE

7/16/24
DATE

JIMMY COX

SENIOR DIRECTOR, ALUMNI CLUBS & STUDENT ENGAGEMENT

This signed document is effective starting July 1, 2024 and expires on June 30, 2025



Addendum A-Financial Policies

Funds provided by the Purdue for Life Foundation assist clubs in engaging as many alumni, students, friends, and fans as possible, thereby advancing the vision and mission of Purdue University and supporting the Purdue for Life Foundation. This helps those that love Purdue stay connected, get involved, and give back.

Funding to clubs is made possible through Purdue Alumni Association membership fees and donations. We manage this money that has been generously donated by our constituents for the advancement of Purdue University. Staff and volunteers should exercise the highest level of responsibility in the management and use of these funds. Engagement fund are to be used for the sole purpose of engaging alumni and friends if a club's designated area.

Club engagement funds will be provided twice, annually in 50% increments, in the form of checks sent to the club treasurer. Checks will be sent in August and January of each fiscal year. The fiscal year for the Purdue for Life Foundation is July 1-June 30. Funds provided to clubs are based on the following...

- Submission of the annual agreement.
- Adherence to the annual agreement requirements, including the submission of the previous year's financial statements
- Submission of the volunteer agreement by each individual board member.
- Number of Purdue Alumni Association members in the club's geographic area.
- The standing of the club based on the recognition program
 - Gold=\$2.50 per PAA member in the club's geographic zip code area + \$500 in operational funds
 - Silver=\$1.50 per member + \$500 in operational funds
 - Bronze=\$500 (flat amount)
- Scholarship donation if the club achieved Gold or Silver level in club recognition program.
 - Gold=\$1,000 (\$500 for clubs that have accounts outside of PRF)
 - Silver=\$600 (\$300 for clubs that have accounts outside of PRF)

Qualifying Club Event for the Club Recognition Program

A qualifying club event is an activity or program promoted to all alumni and constituents in a club's geographic area in the appropriate fiscal year. The qualifying event or program must be completed using Purdue for Life Foundation registration systems and/or communication outlets. This is how our team tracks your progress.

Game watches are encouraged and a great outlet for constituents, but they can only be counted twice for the total number of events.

Events with Fees

Clubs that host events with fees, after paying all expenses, may keep their excess fees in their bank account for future use on events or have the amount donated to the club's scholarship endowment or



supported account, the Purdue University General Scholarship Fund, or the Purdue Alumni Association endowment.

Allowable Expenses

- Food and drink (excluding alcohol due to liability issues).
- Room charges and equipment rental.
- Event supplies.
- Auction items (vintage Purdue items, custom-made items, etc.) to raise funds for a club's scholarship fund. Online auctions are to use the foundation's online auction platform.
- Guest speaker fee.
- Guest speaker travel and meals.
- Honored guest meals.
- Tickets to sporting events when purchasing group tickets for an event.
- Social media advertising.

Non-Allowable Expenses

- Alcoholic beverages (due to liability issues).
- Salaries or honorariums for club officers.
- Membership fees.
- Gift cards (due to IRS reporting issues i.e. giving away gift cards is giving away cash which is not allowed).



Addendum B-Club Recognition Program

Below is an overview of the recognition program and how to achieve each tier level. Please note that while game watches are a great way to engage with local alumni and fans, they cannot be the only events you do to qualify for the program.

TIER LEVELS	Gold	Silver	Bronze
Total Number of Events	8	5	3
Incentives			
Engagement Funds	Yes	Yes	Yes
Scholarship Funds	Yes	Yes	No
<u>EVENT CATEGORIES</u>			
(1) Alumni Engagement & Outreach Initiatives	7	4	3
Suggested Types of Events: (You can host multiple of the same type, do not need to do all listed)			
<ul style="list-style-type: none"> • Monthly Newsletter (minimum 4/year) • Host a family focused event in your community. (Not a student send-off) • Host an event targeting recent graduates and/or incoming/current students (not a student send-off) • Coordinate a community service project with a local organization • Host a professional networking event • Host a social event that brings together alumni, friends, and fans. (Not a Game Watch) • Partner with another Alumni Club and/or affinity group to host an event. (Includes clubs from other colleges/universities) • Participate in educational outreach programs with local schools or community organizations, such as tutoring or service-learning programs • Host a student send-off • Host a game watch (Up to 2 count) • Attend ALVC (At least 1 club leader) 			
(2) Scholarship: Host an event with the primary purpose to raise scholarship funds.	1	1	
	8	5	3