



PURDUE ALUMNI

# ***CLUB LEADERS HANDBOOK***



A GUIDE TO  
**SUCCESS AND ENGAGEMENT**

## Purdue Alumni Clubs Handbook

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## Introduction

Welcome to the Purdue for Life Foundation (PFLF) Alumni Club Leaders Handbook which contains information and resources designed to help you run a successful club that benefits alumni, friends, and fans of the University.

This handbook outlines club responsibilities, 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 both an honor and a responsibility. We appreciate your willingness to take on this important role in advancing the Purdue for Life Foundation's mission. Clubs are the heartbeat of our alumni community, preserving lifelong traditions, fostering Boilermaker pride, and strengthening connections that last a lifetime. Your leadership directly influences the energy, engagement, and success of your club, ultimately contributing to a stronger Purdue community.

Our goal is to provide the tools necessary for running a great club. If you have any questions, we are here to help. Please let us know how we can assist you in any way to help you run a successful club!

Hail Purdue!  
The Alumni Clubs Team

## Purdue for Life Foundation

The Purdue for Life Foundation (PFLF) helps people who love Purdue stay connected, get involved, and give back. Purdue for Life—created in 2020 by uniting the Purdue Alumni Association and the University Development Office—drives and coordinates all alumni-related activities across the Purdue family's post-graduation lives and works with alumni, friends, and fans to garner support for the institution. You can get involved in a variety of ways—including through a region-based club, an affinity network, volunteering and mentoring opportunities, alumni living, travel, giving, and lifelong learning. You can also join the Purdue Alumni Association, President's Council, the John Purdue Club, the Purdue Parents & Families Club, and Purdue Alumni Student Experience.

## Purdue Alumni Association

The Purdue Alumni Association is an independently financed nonprofit organization separate from Purdue University. Through the Purdue for Life Foundation, we offer exciting ways for alumni and friends to engage with Purdue throughout their lifetime. The Foundation combines the alumni engagement function of the Purdue Alumni Association and the University Development Office, and it includes the President's Council, the John Purdue Club, and the Office of Industry Partnerships, as well as alumni lifelong learning programs and on-campus residential opportunities.

### Purdue Alumni Association History

- 1878—J. B. Harper founds the "General Alumni Association" so graduates can stay in touch. Harper serves as the first president
- 1890—Purdue alumni clubs are founded in Chicago and Indianapolis to help keep Purdue connections strong with alumni away from campus
- 1912—Purdue alumni are active in fundraising campaigns to build Purdue Memorial Union. It was dedicated in 1924
- 1914—The Purdue Bulletin, the first publication for alumni, becomes the Purdue Alumnus
- 1927—A state statute is officially enacted that added three alumni-elected trustees to the Purdue University Board of Trustees. George Ade (S'1887) had been the sole alumni trustee role since 1909

- 1953—R.J. Rudolph becomes the first executive director of the Purdue Alumni Association
- 1958—Purdue’s athletic booster group, the John Purdue Club, is founded thanks to the involvement of the Purdue Alumni Association
- 1964—The Purdue Alumni Association hosts its first international tour, traveling with a group of alumni to Europe
- 2004—The alumni association moves to the Dick and Sandy Dauch Alumni Center on the south side of campus
- 2005—PASE (Purdue Alumni Student Experience) is launched. It quickly becomes the largest student group on the West Lafayette campus
- 2020—The Purdue for Life Foundation is created
- 2021—The Purdue Alumni Association joins the Purdue for Life Foundation

## Engagement Team

The Engagement Team handles broad alumni and constituent engagement activities for the Purdue for Life Foundation. Six pillars represent the different areas of engagement:

- Affinity Networks
- Alumni Clubs
- International Travel & Networks
- Lifelong Learning
- Student & Recent Graduate Programs
- Volunteerism

## Alumni Club Overview and Responsibilities

### Purpose of Purdue Alumni Clubs

Our alumni clubs connect alumni, students, friends, and fans in local areas throughout the United States. Club areas are based on ZIP codes that typically encompass a 50–60-mile radius but can vary by location. These clubs create programming and experiences that enhance alumni engagement in a variety of ways, and many also provide scholarships to help students achieve their goal of attending Purdue. Our alumni clubs help those who love Purdue stay connected, get involved, and give back.

Clubs must meet specific criteria to be sanctioned by the Purdue for Life Foundation (PFLF) each year. These requirements are completed between July 1 and June 30, in alignment with the University’s and PFLF’s fiscal year. Events will be tracked through our system and after June 30, club recognition status is granted to those completing the requirements.

Sanctioned clubs must also complete the annual requirements and host at least three events. These clubs will receive support provided by the PFLF. Clubs that achieve recognition status qualify for additional support in the form of increased funding.

# Annual 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 because 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, 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](http://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 for 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 donating to the 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 collecting club dues, annual activity fees, etc., in exchange for engagement funds.
- Adhere to all financial policies
- 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

## Privacy

Privacy and the CAN SPAM act:

It is a Purdue for Life policy that we do not share e-mails lists, and that all e-mail communications must be sent through our system for privacy and tracking purposes.

Alumni can elect to share their information via the online alumni directory that is accessible via PurdueConnect. All degree information is searchable, other information is searchable if user has chosen it to be "shown"

<https://connect.purdue.edu/s/>

Purdue for Life is also required to adhere to the CAN SPAM Act, which has multiple requirements. One key component is allowing for an opt out option on all e-mails. (There is not a way to allow unsubscribes when emails are not sent from the PFLF system.) <https://www.ftc.gov/business-guidance/resources/can-spam-act-compliance-guide-business>

For more information on privacy, please see our privacy notice, located on our website:  
<https://www.purdueforlife.org/privacy-notice/>

## Purdue Alumni Association Membership

Membership in the Purdue Alumni Association (PAA) provides direct funding to Purdue Alumni Clubs. Alumni club leaders are the greatest ambassadors that we have. It is paramount that we cultivate and grow a culture that understands a strong financial stewardship program is key to our long-term success. Thus, club leaders play a significant role in promoting the value of membership to constituents in their areas and will be counted on to participate in membership campaigns organized by the PAA. It is required that all club board officers maintain annual membership or lifetime membership. However, events held by clubs are open to all alumni, friends, and fans regardless of membership in PAA.

## Events

Relationships are at the core of what we do. Our alumni clubs are an important part of the Purdue for Life Engagement team. Events should appeal to a wide variety of interests. Our goal is to create exceptional experiences for our constituents by incorporating a high level of planning prior to events and engaging in evaluation after events. Clubs can plan events in the following engagement programming categories:

1. Personal (social, family-friendly, game watches)
2. Professional (networking, mentorship program, dinners)
3. Intellectual (special interest, arts, lifelong learning, diversity)
4. Scholarships/student events (scholarship fundraiser, PART program, student send-offs)
5. Service (volunteerism)

## Club Recognition Program and Engagement Funds

The Purdue for Life Foundation's Alumni Club Recognition Program recognizes clubs that go above and beyond to support the vision and mission of Purdue University. These high-achieving clubs can earn Gold, Silver, or Bronze status as described below, along with receiving a felt P.

Clubs that achieve one of these tiers receive financial incentives each year to support their events and club scholarship. Funds will be provided twice each year by check sent to the club treasurer or electronically with half of the funds covered in each installment. Checks will be sent in August and January of each fiscal year.

Funds provided to clubs are based on the following:

- Submission of the annual agreement
- Adherence to the annual agreement requirements
- Submission of the volunteer agreement by each individual board member
- Number of Purdue Alumni Association members in the club's geographic area
- Standing of the club based on the recognition program:
  - Gold—\$2.50 per PAA member in the club's geographic area plus \$500 in operational funds
  - Silver—\$1.50 per member plus \$500 in operational funds



- Bronze—\$500 flat-fee payment
- Scholarship donations if the club achieved the level of Gold or Silver in the club recognition program:
  - Gold—\$1,000 (or \$500 for clubs that hold accounts outside of PRF)
  - Silver—\$600 (or \$300 for clubs that hold accounts outside of PRF)

**NOTE:** Clubs that complete activities, but do not use our forms and processes to do so will not have their activities counted in the recognition program. Qualifying clubs receive a decorative felt Block P, a commemorative letter, and recognition during an annual celebration.

#### Recognition Program Overview

Tier Levels	Gold	Silver	Bronze
Number of Events	8	5	3
<b>Incentives</b>			
Engagement Funds	Yes	Yes	Yes
Scholarship Funds	Yes	Yes	No
<b>Alumni Engagement &amp; Outreach Initiatives</b>	7	4	3
<i>Suggested Events – multiple of the same event, do not have to do all listed</i>			
• Monthly Newsletter (minimum 4 per year)			
• Host a family focused event (not a student send-off)			
• Host an event targeting recent graduates			
• Coordinate a community service/volunteer project			
• Host a professional networking event			
• Host a social event			
• Partner with another Alumni Club and/or Affinity Network to host an event			
• Participate in educational outreach programs with local schools or community-based organizations			
• Host a student send-off			
• One or more club board members attend the ACES/Alumni Leader & Volunteer Conference			
• Host a game watch (up to two count)			
• Host a golf outing			
<b>Scholarship</b>			
Host an event with the primary purpose to raise scholarship funds	1	1	

## Board of Directors

Sanctioned clubs will have a minimum of three board members – President, Secretary, and Treasurer. Clubs may have additional board members such as Vice-President, Scholarship Chair, Young Alumni Chair, Event/Game Watch Coordinator, Social Media Chair, and/or a general board member. Committee members may be used for certain initiatives, such as a scholarship committee. All board members and committee members are expected to maintain membership in the Purdue Alumni Association. Dues from membership directly supports club activities via engagement funds and scholarship donations. We can't expect alumni and donors to be members if the example of membership is not upheld by all volunteers involved with a club board. Board members and committee members can serve for two, three, or four-year terms with a maximum of two terms served, back-to-back, before taking a break from the board for the length of a term.

- **Required Officers**
  - President: Active member of PAA; Maintains the operations of the club; Encourage membership; Preside at all meetings; Maintain contact with PFLF; Represent the club at local events; Name on club's bank account; Oversee club's email inbox
  - Secretary: Active member of PAA; Maintains minutes of club meetings; Submit Event Requests/Email Requests/Game Watch Requests/Newsletter Requests/Website Updates
  - Treasurer: Active member of PAA; Responsible for money, fees, receipts, bill payment; Submitting quarterly financial reports to PFLF; Maintaining the club's bank account and budget; Oversee the club's scholarship
- Additional board positions to consider. The more board members there are, the more the work can be spread out and not fall on a few people to plan all events
  - Young Alumni Chair
  - Social Media Chair
  - Scholarship Chair
  - Events Chair
  - Game Watch Chair
  - Regional Chair – recommendation for clubs who are spread over a large area. Consider positions such as “Downtown Chair” or “North Suburbs Chair” to plan events in different parts of your area
- Board members are the leaders of the club's initiatives of engaging alumni, friends, and fans of Purdue through a variety of events; planning and developing communications; and organizing fundraising for scholarship funds (if applicable)
- Boards may determine how often they wish to meet – most will meet monthly and can meet in person or virtually
- Time commitment is approximately 3-5 hours a month depending on the number of events the club is hosting
- Terms should be structured around the fiscal year, July 1-June 30, and new board members should plan to take over July 1

## Bylaws

The bylaws are the regulations of the club. They contain the basic rules for the conduct of the club's business and operations. Clubs may create their own bylaws using the example provided in Appendix B. These bylaws will not take the place of the policies outlined in the Alumni Club Volunteer & Financial Policies Agreement.

### Board Election Process

See Appendix C for best practices and election timeline

## Scholarships

### Types of Scholarships

- Alumni Club Scholarship Accounts (supported accounts) are for established clubs that have not met the minimum amount for an endowed account
- Endowed Accounts are available for clubs with a minimum deposit of \$50,000. The University invests the money, and income is distributed in May and November to the support account based on the University endowment policy. Endowment accounts have the potential to grow over time while providing funds to award scholarships

- Donations may go to either the endowed or support account

## Contributing to the Scholarship Fund

- Checks – make checks payable to Purdue Research Foundation and include the scholarship designation – Purdue Club of XXX Scholarship or Purdue Club of XXX Endowment (if the club has an endowed account as an option). Checks should be mailed to:  
Purdue for Life Foundation  
Attn: Finance  
Dick and Sandy Dauch Alumni Center  
403 W. Wood Street  
West Lafayette, IN 47907-2007
- Online – donations to your local club scholarship may be through the scholarship link on your club's home webpage: <https://www.purdueforlife.org/clubs/>
- Optional donation link in event registration

## Tax Deduction

- If an individual writes a check or makes an online donation to the Purdue Research Foundation (PRF), the gift is tax deductible and PRF will issue a gift receipt
- If an individual makes a scholarship donation to the club and the club in turn writes a check to the scholarship fund, the donation is not eligible for a tax deduction
- If a club writes a check to its scholarship fund, the club will receive a gift receipt, but it will have no value for tax purposes

## Company Gift Matching

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 writes a check to PRF or Purdue University, the company will likely match the gift. Visit <https://www.purdueforlife.org/give/ways-to-give/matching-gifts/> to see if your company offers a matching gift.

## Selecting Scholarship Recipients

- Most clubs select recipients based on their scholarship or endowment agreement. Students apply using the Purdue for Life Scholarship Application and abide by the Purdue scholarship awarding timeline
- A few scholarships are selected by the Division of Financial Aid based on the written criteria provided in the scholarship agreement or endowment. The DFA selects incoming freshmen after February 15. Selections for returning students are made after May 1
- The following criteria may not be used to exclude a student from consideration from scholarship consideration: gender, race, ethnicity, socioeconomic status, sexual orientation, religion, disability, age, or national origin

## Club Selected Scholarships

Incoming freshmen and current Purdue students will apply using the Purdue for Life Scholarship Application.

- Awarding Timeline
  - November – roll-off to the support account for clubs with an endowed scholarship
  - November – projections for scholarship award amount due to DFA

- December 1 – application goes live
- January 15 – deadline for clubs to donate additional funds to the scholarship support account. Donations after this date should plan to be utilized for next year's award cycle
- February 1 – deadline for incoming freshmen and current Purdue students to submit the application
- February 15 – deadline for scholarship committees to submit scholarship awardees to PFL
- March – Early to mid- the Division of Financial Aid (DFA) begins to release financial aid packages to incoming students. Club scholarships will be included in this package
- March 31 – deadline for scholarship committee to submit current Purdue student awardees to PFL
- May 1 – deadline for incoming freshmen to accept the offer of admission
- June – the Division of Financial Aid begins to release financial aid packages to current Purdue students
- Clubs may choose to rank recommendations. It is strongly recommended that clubs select several alternatives in the event a recipient elects not to attend Purdue or will receive awards to put them over the cost of attendance
- The following criteria may not be used to exclude a student from consideration for the scholarship program: gender, race, ethnicity, socioeconomic status, sexual orientation, religion, disability, age, or national origin
- Clubs send their recipient selection(s) to PFL and clubs staff then award through the University's online system. Students will see their award when the Division of Financial Aid releases notifications through myPurdue. Clubs wishing to invite their recipients to a dinner/send-off event may do so utilizing the contact email the student provided on the application. Any contact made with a scholarship recipient needs to include the following verbiage: *Scholarships, Awards and Prizes must be considered educational resources for the student per federal regulations. Therefore, any funds awarded to the student are reported to the Division of Financial Aid and considered a part of the student's total aid package. Please note, students may not receive gift aid exceeding the total cost of attendance.*

## Scholarships Awarded and Amounts

- If a club selects recipients, the club determines the number of scholarships and the award amount. Purdue for Life needs to be notified of the recipients and the amount of each award
- If the Division of Financial Aid selects recipients, they will determine selections based on scholarship or endowment criteria and the current amount in the scholarship fund

## Criteria for Selection

Selection criteria are established when the scholarship account is created. Future changes are permissible and must be made in writing. They should be submitted to Purdue for Life by August 1. The more specific criteria is, will make it more difficult to select recipients. The following criteria in any number of combinations may be considered:

- Merit – scholastic achievement including criteria such as leadership, work experience, volunteerism, etc. Scholarships generally require a minimum grade point average (GPA)
- Location – most clubs indicate that recipients should be from the club's locality – either defined as an entire state, selected counties, or ZIP codes
- Year in School – clubs may designate their scholarships for incoming students only, returning students only, or a combination of both

# Support for Sanctioned Purdue Alumni Clubs

Sanctioned and active alumni clubs are an essential part of Purdue for Life Foundation's mission. Clubs keep alumni, friends, and fans connected to each other and the University. PFLF offers sanctioned clubs operational and financial support, provided annual requirements are met.

- Online Services: A variety of services are available to support clubs, including Purdue Portal, Purdue Ties, Alumni Club Resource Library, Email and Event Request Forms, the Alumni Newsletter Template, and Game Watch requests
- Club Promotion: Club events listed on the Events website, Game Watch postings, mass email invitations to alumni in your area
- Event Box: Sent for social events or other designated events; can include name tags, brochures, pens, P lapel pins, pom-poms, and other décor as available
- Scholarship program: A staff liaison will assist with the scholarship process and serve as administrator between the club and the Division of Financial Aid
- Student Recruitment: In conjunction with the Office of Admissions, consider volunteering for the PART (Purdue Alumni Recruitment for Tomorrow) program, <https://www.admissions.purdue.edu/part/>. Admissions will reach out if volunteers are needed to help at college fairs or information sessions for prospective/admitted students. Admissions will provide all materials to be used at college fairs
- Tax Identification Number: Staff will provide resources on how the club may apply for an EIN (Employer Identification Number) for the purpose of opening a small business checking account
- Alumni Leader and Volunteer Conference (ALVC)/Alumni Clubs Engagement Summit (ACES): A spirit of volunteerism is at the very heart of our mission at the Purdue for Life Foundation, and this annual conference is essential to our success. We cherish the opportunity to celebrate our outstanding alumni volunteers and the impact they make for alumni, students, and friends everywhere. <https://www.purdueforlife.org/alvc/>
- Club Handbook: Online reference manual for club leaders
- Liability Insurance: Coverage available to clubs at no cost through Purdue Research Foundation
- Speakers: When feasible and applicable, speakers from the Purdue for Life Foundation can be provided for club events. The club is responsible for any speaker fees, as well as travel and accommodation expenses for non-PFLF staff
- Visit from staff. Let us know which event you would like us to attend. Our staff will make every effort to join you
- Golf Outings: We will assist in promoting your golf outing and provide golf-specific giveaways. Many clubs hold outings as fundraisers for their club scholarship or hold their annual dinner in conjunction with the golf outing
- Alumni population map of the club's area

## Facebook Group

Request to join the private Facebook group, Purdue Alumni Club Leaders. This is for club leaders to get to know each other, share ideas, ask questions, and post fun things your club is doing. Search "Purdue Alumni Club Leaders" and click Join Group.

## Purdue Portal

The Purdue Portal, <https://connect.purdue.edu/s/login/?ec=302&startURL=%2Fs%2F>, is the best way to keep contact information current as well as keep track of giving, JPC points, and volunteer activity. It is important to maintain an updated email address and physical address to ensure the receipt of emails for club events taking

place in your area. You may also opt-in or opt-out of email notifications you would like to receive. Example: Live in Indianapolis, but spend the winter in Sarasota? Opt-in to the Purdue Club of Sarasota to get information on their club events so you can join in while away from your home club.

## Purdue Ties

Purdue Ties, <https://www.purdueforlife.org/purdue-ties/>, is the networking and mentoring platform of Purdue University. Users can post updates, share resources, request professional development help, connect with a fellow Boilermaker for mentoring, and browse job postings. This platform is available for alumni, students, faculty and staff, family, business partners, and friends of the University.

## Communication

### Websites

PFLF provides sanctioned alumni clubs with a web page. All club pages maintain the Purdue for Life Foundation brand template. Information includes a club welcome, scholarship information, and club contact information. To request changes to the website, submit the Web Page Update request, <https://www.purdueforlife.org/alumni-leaders/clubs/alumni-club-request-forms/>

### Social Media

Clubs are encouraged to create a Facebook, LinkedIn, and/or Instagram page or group which must be set to public to ensure accessibility and engagement with alumni and the broader community.

A link to the club's social media platforms will appear on the club's webpage. Social media is a great way to provide secondary communication about club events to local members and create excitement about the club via photos and posts.

- Key guidelines
  - Posts should align with the University's values, mission, and alumni engagement goals
  - Content must remain professional, inclusive, and respectful
  - Avoid posting or endorsing political, religious, or otherwise controversial content
  - All images, videos, and graphics should be appropriate and, when possible, align with university branding
  - Personal contact information, including phone numbers, addresses, or email addresses, should never be shared publicly
  - Alumni clubs should not use social media to collect, store, or manage alumni data outside of approved university systems
  - Clubs may promote events, initiatives, and university-approved fundraising efforts in coordination with the Purdue for Life Foundation
  - Any fundraising efforts must comply with university policies and receive prior approval before promotion
- Administrator and Page Management
  - To ensure continuity and consistent oversight:
    - Alumni clubs should designate at least two administrators for their pages or groups
    - Administrators are responsible for transitioning account access during leadership changes to maintain page security

- The University reserves the right to request administrative access or require changes to a club's social media presence if deemed necessary
- Engagement and Moderation
  - To foster a welcoming online environment:
    - Clubs should encourage positive engagement and civil discussions amongst members
    - Negative, offensive, or inappropriate comments should be addressed in accordance with established moderation guidelines
    - Blocking or removing members should only be done in extreme cases, following a clear policy
- Compliance with Platform Terms and University Policies
  - All alumni clubs must:
    - Adhere to the terms of service for all social media platforms they utilize (Facebook, Instagram, LinkedIn, X)
    - Follow Purdue University's official alumni relations policies regarding communication, branding, and data management
- To improve visibility and ensure ease of finding your social media pages, follow these best practices
  - LinkedIn – Club Pages need to be public – The entire board should be designated as Admins
  - Instagram Club Pages – Use easy to find naming – examples: PurdueAlumniClub or PurdueClub<Location>
  - Facebook: Purdue Alumni Club of <Location> - the official club's name

## Club Newsletters

Sending a quarterly Club Newsletter is a great way to keep your club informed of your events and plans. Sections include: Upcoming Planned Events; General Club News; Mark Your Calendars; and Contact information. A template is available and it can be attached to the email request form: <https://www.purdueforlife.org/alumni-leaders/clubs/club-email-and-event-forms/>

## Emails

The Purdue for Life Foundation manages club emails and event registrations centrally, beginning with our standardized email and event forms. This allows our combined email and event promotion efforts to be more effective, targeted, and streamlined, while also increasing visibility for club events and messages.

<https://www.purdueforlife.org/alumni-leaders/clubs/club-email-and-event-forms/>

### ***General Information Email Form***

The general information email includes newsletters, general club information, etc. We request at least four business days of advance notice for general information emails. Please review the email text and correct any grammatical or informational errors before submission. Clubs can attach a document with email text. In the "Please enter the text of your email" box, write "Attached".

## Events and Game Watches

Events and game watches are a great way to get local alumni, friends, and fans involved with the club as well as make new connections. Events can be social or philanthropic. When planning events think of a variety of options to include different age ranges and interests – family friendly events such as a day at the zoo, visiting a local orchard during the fall, or attending a local minor league sporting event; fundraising events for scholarships such

as dinners or golf outings; cheering on the Boilers at a football or basketball game watch party or hosting a joint watch party with another university alumni club (think Purdue and IU alumni clubs to watch a rivalry game); holiday get togethers; networking events particularly focused on young alumni in the area; organizing a community service project such as food drives or Salvation Army bell ringers; hosting a summer student send-off. The Clubs team is happy to help you with new ideas!

## Email and Event Request Form

This form is for events that require RSVP and/or payment. The number of emails sent to promote the event will depend on how far in advance we receive the event registration and email form. We request at least eleven business days of advance notice for event registrations and emails.

- The number of emails sent will depend on when the request was received:
  - Request received at least 30 days prior to the event date – an invite email, reminder email, and pre-event email are sent
  - Request received less than 30 days prior to the event date – an invite email and pre-event email are sent
  - Requests for urgent event emails should be directed to [alumniclubs@purdueforlife.org](mailto:alumniclubs@purdueforlife.org) and [mchelp@purdueforlife.org](mailto:mchelp@purdueforlife.org) (if after hours or weekends). Urgent requests are defined as notices of an event cancellation or change of venue/times. If an urgent request is sent that is not deemed urgent, it will be routed through the normal process.

### Each event registration includes:

- An event listing on the Purdue for Life website, <https://connect.purdue.edu/portal/s/events>
- Email promotion to alumni, friends, and fans in the club's geographical area
- A confirmation email to registrants
- A reminder email sent to all registrants, with full event details
- Final registration report, sent prior to the event

## Events with Fees

Clubs that host events with fees, after paying all expenses, may keep 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. Payment for attendees is set up through the event request form. You may set a flat fee for each person, set different fees for PAA members and non-PAA members, or a cost for children.

Payment for an event: The cost of the event should be paid from club funds. If the club does not have funds to cover, there are two options for payment:

- Alumni Clubs staff can cover the cost of the event and will be repaid from what is collected via the online registrations. This can be dependent on the cost due to limits on the corporate credit card
- Once the venue is secured, send the contact person to Alumni Clubs staff to work directly with the venue on payment. PFLF Finance will send a check to cover costs, and that amount will then be deducted from what is collected via the online registrations.

### Allowable Expenses

- Food and drink (excluding alcohol)
- 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
- Guest speaker's fees



- Honored guest meals

#### **Non-Allowable Expenses**

- Alcohol (liability concerns because of volunteer-led events)
- Salaries or honorariums for club officers
- Membership fees
- Paying towards a scholarship outside of an authorized scholarship donation to a PFLF account
- Gift cards – due to IRS reporting, a gift card is considered a cash gift and cash gifting is not allowed

## Refunds

Refunds for payment from an event are available from PFLF up to 15 business days prior to the event date. All refund requests after that will be at the discretion of the local club and needs to be addressed with the club president.

## Game Watches

Game watches are a fun way to bring fellow Boilermakers together and show Purdue spirit. In order for watches to be posted on the game watch website, submit the game watch request form:

<https://www.purdueforlife.org/alumni-leaders/clubs/game-watch-location/>. Dates for submission are posted on the website. A separate form will need to be submitted for different venues on the same date.

## Sporting Events

Clubs interested in attending professional sporting events should work directly with the organization for tickets. Many teams will create a special website specific to the group purchase. That link should be included in the event and email request and it will be included in the email invitation as well as posted on the event page. <https://www.purdueforlife.org/alumni-leaders/clubs/game-watch-location/>

## Events at a Distillery/Brewery/Winery

Purdue for Life has contracts with two bourbon distillers for PFLF Bourbon production. The contracts stipulate that they are the "preferred bourbons" of PFLF for the terms of the contracts. Also, PFLF does not allow any retail sales for liquors, nor will they approve specialized labels. Clubs may do tastings at local establishments and attendees may purchase alcohol on their own.

## Event Boxes

Requests should be made at least two weeks prior to the event to ensure enough time for shipment. Event boxes are sent via ground shipping. Items such as pompoms and table tents are decorative and should not be used as give-a-ways. Shipping costs are expensive if we need to keep replenishing these items. Club funds may also be used to purchase additional swag items.

## Speaker Requests

Please submit your request at least 90 days prior to the event using the Speaker Request Form:

<https://www.purdueforlife.org/alumni-leaders/clubs/speaker-request/>. If you would like to ask someone from outside the Foundation to speak, use your local and Purdue connections to make those requests. Please do not reach out to the Office of the President as his schedule is strictly managed.

## Tips for a Successful Event

- Create a budget
- Create a timeline – ensure event request forms/email requests are submitted at least 30 days prior to the event
- Visit sites you are considering – does the space work with the number expected? Is parking easy? Accessibility? Family friendly (depending on your event)? Downtown vs. suburb?
- Space layout – room for a check-in/welcome table; enough space for people to socialize
- Tables and chairs – sit down tables; high tops; chairs only – consider the type of event and food you will be serving
- Consider charging a fee. People are more likely to show up if they pay to attend. Establish a no refund policy – this money can then be directed to your scholarship account
- Do you want to have a speaker at the event? Consider your timeline to make those requests
- Do you need to request an Event Box with decorative items or give-away items?
- Plan to have specific alumni serving as greeters at the door, guiding them to the check-in table, providing nametags, making newcomers feel welcome (particularly young alumni)

## Event Examples

- Game watches – ensure the location has the network to televise the game available. Networks airing Purdue games for football and basketball can vary including NBC; BTN; Peacock; Fox; FS1; ESPN; ESPN2; or CBS. Plan events you want to schedule to get the word out. Submit the game watch form so an email notification will go out and the events will be posted on the Purdue for Life game watch website. Promote them on social media. Encourage people to sign in using QR codes. If you are in a large city, consider using venues in different locations
- Golf outings – golf outings can serve as a fundraising activity along with socializing. If you haven't hosted a golf outing before, reach out to the PFLF Engagement team for help. We can also connect you with club leaders who have been running successful outings for advice
- Student Send-Offs – held during the summer. These are great ways to bring Purdue students and alumni together, especially first-time freshmen. It allows them to meet other students from their area who are going to Purdue, parents to get to know each other, and alumni to interact with them. Some clubs will also invite current Purdue students and their parents to attend to offer advice and friendship to incoming freshmen. You may consider recognizing your scholarship recipients at these events. Early planning is necessary for these events. It can take up to three weeks to get students' emails for invitations. This is a great way to involve young alumni. They have just been through the Purdue experience and can share that enthusiasm with incoming freshmen. Be sure to welcome and greet incoming families. You may also consider splitting the parents and students up for a bit to allow students to interact with the young alumni and ask questions. They tend to open up and ask questions if their parents are not present
- Annual Dinners - Bring your local alumni together with a once-a-year dinner for updates, hear from a speaker, and fundraise for scholarships
- Networking dinners/Happy Hours/Kick-Off event – this is an easy way for people to drop in and connect socially and professionally. A Kick-Off event can be held in August/September, potentially with a football watch party to let attendees know what you have planned for the year and meet new board members
- Meet the Club Board – host an event for the club board members to connect with constituents, particularly those new to board positions
- Service activities – give back to the local community through volunteering at food banks, Habit for Humanity, blood drives, community clean-ups
- Attend a local professional sporting event as a group. Many times, groups will be recognized on the jumbotron!

- Trivia nights
- Euchre gatherings – bring the mid-west card game to your area
- Winery/brewery tours – check for Boilermaker owned venues in your area
- Career development help sessions. These can be great events to get recent graduates to attend
- Depending on schedules, a staff member from the clubs team may be able to attend one of your events in person

## Fund Raising and Philanthropy

### Door Prizes

- Use the term “door prize” not “raffle”
- When giving out a door prize, everyone needs to receive one free ticket. Additional tickets may be purchased
- Games of chance are allowable

### Fundraising for Non-Profits

Clubs may want to do events that fundraise for a non-profit such as a cancer walk. Events such as this are a great service activity, however PFL will not include a direct donation link to the non-profit in an email or event posting. We can include the non-profit’s general website that may have a donation option.

### 501c3 Requests

The Purdue Alumni Association’s Federal ID #35-0595500, may be requested by a venue to prove non-profit status. Clubs use this PAA Federal ID#, not the PFLF or PRF Federal ID#. This is because clubs were created under PAA. This is public record, and can be found on both the Secretary of State's website as well as <https://www.guidestar.org/>. If a venue is requesting a copy of the IRS letter, reach out to club’s staff and we will send a copy of the letter to you.

### Thanking Donors

If the club would like to send thank you notes to people who donated to the club scholarship, this form will need to be submitted: <https://purdue.tfaforms.net/186>. Once the form is received a list of donors will be pulled and sent via FileLocker to the person who submitted the form.

# Bank Accounts

See Appendix D for steps to obtain the EIN number. This is the first step in opening a bank account

## Setting up the bank account

- When the EIN is established, you may set up a club account at a local bank. This needs to be set up as a regular checking account. The club president and treasurer should be on the account and this information needs to be kept current. If there is a conflict of interest with the president, another board member can be on the account with the treasurer. The two people on the account should not be related. If there is a change with the club treasurer, the bank and Purdue for Life need to be notified of the update to ensure payments are sent to the correct person. If the names don't match, payment will be returned to Purdue for Life.
- Electronic payments may also be set up with Purdue for Life. If you are interested in this option, work with the Clubs team to submit the ACH (automatic clearing house) form to set it up with your bank. Purdue for Life will send the form to the club treasurer to complete. The form needs to be uploaded using the upload feature for the quarterly financial reports. For security purposes, please do not email it since it contains the bank account number. Electronic transfers may still take three-four weeks to process (check runs are done every two weeks), but it will ensure the money goes directly into the club's account rather than waiting for the check to come in the mail.

## Quarterly Financial Reports

Alumni clubs are required to submit bank statements and financial reports so Purdue for Life staff can ensure that spending adheres to prescribed guidelines. These documents are due: January 15, April 15, July 15, and October 15 and need to be submitted in order for the club to receive engagement funds. Clubs staff will review the reports to ensure expenditures look in order.

Reports are submitted via the link along with bank statements for the previous three months:

<https://www.purdueforlife.org/alumni-leaders/clubs/alumni-club-quarterly-financial-report/>.

## Tax Documents

### 1099-INT Guidance for Alumni Clubs

If your club receives a **1099-INT** (issued when a financial institution pays interest income), we recommend the following actions:

- **Consult a Tax Professional:**  
We recommend speaking with a tax accountant or CPA to determine whether any action is needed regarding the 1099-INT. Because tax laws vary by state, it is best to consult an expert familiar with your local regulations. Consultation fees may be paid from club engagement funds.
- **Account Balances:**  
To help reduce the likelihood of receiving a 1099-INT, we recommend keeping account balances (including CDs) under \$5,000. Consider putting funds toward engagement events or allocating them to your club scholarship's engagement account or actual scholarships

### 501(c)(3) Status:

We recommend our clubs not register as independent charitable organizations (such as 501(c)(3) or

501(c)(7)). Purdue Alumni Clubs operate in association with the Purdue Alumni Association and Purdue for Life.

Operating under this structure also ensures coverage under our blanket liability insurance policy.

Tax filing is not necessary for clubs who are operating under the Purdue Alumni Association/Purdue for Life Foundation. Any clubs that are still operating as a 501c3 DO need to file the Annual Business Entity Form and the Form 990.

Questions on this topic: Please contact your Purdue Alumni Clubs Team to discuss.

## Logo Usage

Purdue University is the owner of the Purdue name and logo and all other associated marks. Use of Purdue's marks without an express license or permission is strictly prohibited. Therefore, only brands and co-brands officially sanctioned and created by Purdue Marketing and Communications, such as those to which you may gain access through this website, may be used. No Purdue mark (including any Purdue co-brand or mention of Purdue or Purdue University) may be created, modified, adapted, transformed, reworked, refashioned or changed in any other manner. Failure to comply may result in revocation of permission to use Purdue marks or co-brands as well as other sanctions imposed under authority of the Board of Trustees, and at user's expense, to remedy the unsanctioned action or use.

Brand fonts and official Purdue colors should be used. If you don't have access to the official fonts – Acumin Pro, United Sans, or Source Serif Pro you can use Impact in place of United Sans, Franklin Gothic in place of Acumin Pro, or Georgia in place of Source Serif Pro. The official fonts aren't available in Canva as you discovered so using the alternates are acceptable. The official fonts are available in Adobe. Information on fonts and colors can be found here: <https://marcom.purdue.edu/our-brand/visual-identity/#fonts>

Official Purdue Alumni Club logos for use may be accessed on our website:

<https://www.purdueforlife.org/alumni-leaders/clubs/alumni-clubs-logos/>. Clubs must use only current, updated logos for their event and communication pieces, especially for social media.

If you want to purchase items, please ensure they are created by a Purdue licensed seller. A list of those are posted here: <https://clc.com/license-search/>. Making items using a copyrighted Purdue logo, making t-shirts at home, using Boiler Up! or Boilers and then selling those T-shirts is an example of something that is not allowed. Information on trademarks and licensing may be found here: <https://www.purdue.edu/trademarks-licensing/>

You may purchase name badges and business cards through the Purdue Storefront:

<https://www.purdueforlife.org/alumni-leaders/clubs/storefront/>

## Alumni Awards Program

Clubs and Volunteers who go above and beyond will be considered for an award. Awards available for individuals are: Boilermaker Pride Award; Young Alumni Award; Outstanding Board Member; Boilermaker Cares Award; PART Volunteer; Scholarship Volunteer. Awards available for clubs are: Creative Club Event; Student Outreach Event; and Grit Award.

## Alumni Clubs Engagement Summit (ACES) and Alumni Leader & Volunteer Conference (ALVC)

Each year the Engagement team works to bring volunteer leaders to campus for the annual conference. Prior to ALVC is ACES for alumni club leaders to connect, share ideas, and hear from clubs staff.

## Purdue Day of Giving

The Purdue Day of Giving is held in April. Come together with the Purdue community around the world to help the University take its next giant leap to build a better world together. Every gift is appreciated!

<https://dayofgiving.purdue.edu/>

Purdue Alumni Clubs participate in Purdue Day of Giving by raising funds for their local scholarship. Funds can be directed to the support account or endowment (if the club has an endowment). Clubs are eligible to receive bonus funds based on which clubs raise the most money and receive the most donations.

## Statement of Integrity & Volunteer Conduct and Expectations

Every volunteer for Purdue University through the Purdue for Life Foundation must agree to and abide by the following, which is the Statement of Integrity and Volunteer Conduct and Expectations. Volunteers need to sign this annually.

### ***The Purdue for Life Foundation 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 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 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 for Life Foundation and contribute to a collegial, positive, and inclusive environment that does not discriminate on any basis.

### *Communications*

All correspondence reflects the Purdue for Life Foundation. Volunteers serving in any leadership capacity 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 the Purdue for Life Foundation, 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 for Life Foundation has dealings, observe the following principles:

- Collect, use, and retain only the personal information necessary for 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
- Do not share or sell information obtained through a club/network or volunteer activity under any circumstances
- 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.

<https://www.purdueforlife.org/alumni-leaders/clubs/alumni-leader-integrity-conduct-expectations/>

## Calendar

- July 1 – Fiscal year begins and new board members officially begin
- July 15 – Quarter 4 bank statements/financial report due

- July 30 – Bank Account Transition – new president and/or treasurer need to be added to the bank account. A new treasurer will also need to submit an updated ACH form to Alumni Clubs
- July 30 – Social Media Transition – add new applicable board members to the social media accounts. Remove past administrators
- July – Reminder to board members who have not signed the Statement of Integrity. Both current and new members must sign each year
- July – Reminder to president and treasurer if the club agreement has not been signed
- July – Begin planning football game watches
- August – First half of engagement funds disbursed. Clubs must have submitted 4<sup>th</sup> quarter bank statements to receive these funds
- August – Fall scholarship disbursements made
- August – Wrap up send-off events no later than the second weekend
- September – ACES/ALVC on campus
- October 1 – Reminder sent to clubs who have not signed the club agreement, statement of integrity, and/or not submitted 4<sup>th</sup> Quarter financial reports
- October 15 – Quarter 1 bank statements/financial report due
- October – Begin planning basketball game watches
- October – Fall check-ins with Alumni Clubs staff
- November – Kick-off email sent for club scholarships
- November – Endowment roll-off for clubs with a scholarship endowment
- December 1 – Scholarship application will go live
- December – Watch for “submit event/email by” date for Winter Recess
- December – No club leader forum. Newsletter will be sent
- January 15 – Quarter 2 bank statements/financial report due
- January – Second half of engagement funds sent
- February 1 – Deadline for students to submit the scholarship application
- February 15 – Scholarship awardee names due to Alumni Clubs Staff
- February – Spring check-ins with Alumni Clubs staff
- March – Begin election callouts
- April 15 – Quarter 3 bank statements/financial report due
- May – New club board elections



- June 15 – Leadership roster due to Alumni Clubs. Roster must be submitted even if there are no changes to the board members
- June 25 – Club Agreement signed by the president and treasurer are due to Alumni Clubs.
- June 25 – Signed Statement of Integrity signed by all board members due to Alumni clubs. A new statement must be signed even by returning members
- June 30 – Fiscal year ends

## APPENDIX A

**THIS DOCUMENT IS SENT TO THE CLUB PRESIDENT AND TREASURER VIA DOCUSIGN**



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 twice for 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 encounter 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](http://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 donating 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:**

---

SIGNATURE

---

DATE

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 funds 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 should 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

##### Incentives

Engagement Funds	Yes	Yes	Yes
Scholarship Funds	Yes	Yes	No

#### EVENT CATEGORIES

##### (1) Alumni Engagement & Outreach Initiatives

7	4	3
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#### Suggested Types of Events:

*(You can host multiple of the same type, do not need to do all listed)*

- 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 of raising scholarship funds.

1	1	
8	5	3

## APPENDIX B

### Purdue Alumni Club of \_\_\_\_\_ Bylaws Template

#### Article One - 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 Two - Purpose

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

#### Article Three - Membership

Membership in the club is open to alumni, friends, and fans of Purdue University. There is no membership fee to be part of the alumni club.

#### Article Four - Fees

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

#### Article Five – Board Members

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 a minimum of three positions – President, Treasurer, and Secretary. Additional board members examples: Vice-President, Scholarship Chair, Social Media Chair, Events Chair, Game Watch Chair, Young Alumni Chair

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
- **Secretary** – The secretary will record the minutes of all meetings
- **Treasurer** – The treasurer will be responsible for handling money, receipts and payment of bills for the club. The treasurer shall submit quarterly financial reports (January 15/April 15/July 15/August 15) consisting of bank statements and expenditures to Purdue for Life

Club officers will maintain annual or lifetime membership in the Purdue Alumni Association.

Club officers may serve terms of 2, 3, or 4 years. An officer may serve no more than two terms, back-to-back, before vacating the board for the length of one term.

#### **Article Six – Elections**

Open nominations in the month of April. Candidates interested in a board position will submit their information via a survey. In May, candidate information and the voting process will be sent to all constituents in the club's area with a deadline to submit of June 1. Results will be sent to club leaders to contact those elected. Clubs will decide if positions are determined at the time of election or if the elected board members, then nominate and the first board meeting.

#### **Article Seven – Board Management**

#### **Article Eight - 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 board members thirty (30) days prior to holding such meetings.

## **APPENDIX C**

### **ALUMNI CLUB ELECTIONS: BEST PRACTICES FOR BOARD MEMBER RECRUITMENT OUTREACH STRATEGIES RECRUITING STRATEGY FOR ALUMNI CLUB ELECTIONS**

Recruiting new board members may be thought of as a challenge, however with a few consistent steps each year, you can help create a pipeline of engaged volunteers, ready to step into leadership. To recruit passionate and engaged alumni for your alumni board, we recommend using a multi-channel approach that includes direct outreach, digital marketing, and strategic events.

#### **Identify & Target Ideal Candidates**

- **Engaged Alumni:** Those active in your events, donations, mentorship, or regional alumni groups
- **Emerging Leaders:** Young professionals or mid-career alumni seeking leadership experience (including past PASE members, who are encouraged to get involved in their local clubs upon graduation.)
- **Experienced Professionals:** Alumni with industry influence who can bring strategic value
- **Past Student Leaders:** Former student government, club leaders, or athletes who stay connected

#### **How to find them?**

- **Host Leadership Callouts:**
  - Host a casual info session (virtual or in-person) about board service



- Consider hosting one lunch time and one evening session for a wider audience reach
- Ask current board members to personally invite alumni they know
- Allow alumni to meet current board members and ask questions
- Work with PFLF Staff: The Alumni Clubs team can help you coordinate leadership call outs for your community. The easiest way is to make a virtual call out, and a PFLF staff member can join the meeting virtually to help you walk through the process
- **Recruit Engaged Members:** Review past event sign-ups, social media interactions, or LinkedIn activity
  - PFLF Alumni Clubs staff can help you make direct contact with alumni for whom you may not have contact information, or reach out via social media
- **Ask for Staff Referrals:** PFLF Engagement staff, professors, and career services may know strong candidates. One great place to start is with the individual college or school alumni boards
- **Past Volunteers:** Tap into previous club and/or regional chapters, Greek life, and cultural organizations
- **Encourage Self & Peer Nominations:** Encourage alumni to nominate themselves or others who would be a great fit

## How to excite alumni to run for leadership and board positions?

### Clearly Communicate the Value of Serving

- Highlight leadership opportunities and networking benefits
- Share testimonials from past board members about their experience
- Emphasize how serving contributes to advancing Purdue and Purdue's legacy of alumni service
- Showcase board members in newsletters and social media channels
- Highlight how board service can help with career development
- Connect board service to university initiatives and leadership training programs
- Offer opportunities to engage with faculty, administration, or industry leaders
- Show the impact this service has on future generations: Share success stories of board-led initiatives (e.g., mentorship programs, scholarships, reunions)

Examples:

**Highlight Leadership & Professional Development:** *"Looking to boost your leadership skills and expand your network? Get involved in the Purdue Alumni Club of [City]! Serving on the Board offers hands-on experience in event planning, fundraising, and strategic decision-making—valuable skills for any career!"*

**Emphasize Giving Back & Making an Impact:** *"Passionate about strengthening our alumni community? As a board member, you'll have the opportunity to create meaningful engagement programs, mentor younger alumni, and shape the future of our alumni network!"*

### Outline Responsibilities & Expectations

- Be transparent about meeting commitments, term lengths, and duties. This helps attract serious candidates
- Offer flexibility for members with different availability
- Address concerns about workload by showing how responsibilities are shared
- Pair potential candidates with a mentor on the board to guide them

### Foster Fun

- Ensure board meetings are engaging, not just business oriented. Consider building in social time prior to planning meetings. This also helps foster stronger relationships between volunteers, leading to increased commitment

## OUTREACH

### Personal & Direct Outreach

- Send Personalized Invitations: A direct email, phone call, or LinkedIn message from a current board member makes a strong impact

- PFLF Alumni Clubs staff can help you make direct contact with alumni for whom you may not have contact information, or reach out via social media
- Have a current board member reach out to prospective alumni they know in their own circles of influence

### **Social Media & Digital Engagement**

- Share alumni impact stories through newsletters and social media
- Create a club community in [PurdueTies](#). PFLF staff can help
- Create short Instagram video testimonials from past or current leaders to inspire candidates
- Post engaging content about board opportunities on LinkedIn, Facebook, and Instagram
- Create short videos showcasing the fun and impact of being on the board
- Use alumni newsletters to reach a broader audience

### **Club Facebook Group or Instagram post Idea - Share a Personal Testimonial**

*"Before I joined the alumni board, I felt disconnected from my university. Serving on the board not only reconnected me but also introduced me to lifelong friends and professional contacts. It's been one of the most rewarding experiences!" – Alumni Member Name (Major '08), former Board VP*

### **ELECTION PROCESS**

#### **Timeline**

- March/April
  - Call outs
  - Deadline to complete – April 15
- May – Elections
  - Submit survey request by April 30
  - Election results due to Alumni Clubs team by May 31
- June – Leadership Transition
  - June 15 – leadership roster due to Alumni Clubs team
  - June 25 – Club Agreement signed by President and Treasurer and Statement of Integrity signed by all board members
- July – Bank Account Transition
  - July 15 – 4<sup>th</sup> quarter bank statements due
  - July 30 – If a new president and/or treasurer are elected, names on the bank account need to be transitioned to the new officers. An updated ACH form (if the club utilizes) needs to be submitted to Alumni Clubs with the new treasurer's information

#### **Ways to Recruit**

- Survey – the Alumni Clubs team can create this for you
- Create a call-out event virtually or in-person. Whatever you think will work best in your area
- Utilize an email request, newsletter, and social media posts to include a blurb for people interested in joining the board. Include contact information for a current board member to contact with questions or to learn more about what is involved
- Event invitations – a link to your board election survey or a call to action (*Submit your name and email if you are interested in serving on the club board!*) can be added to the registration page leading up to elections. Use the email request form for this. Reach out to LeAnne Williams, [lewilliams@purdueforlife.org](mailto:lewilliams@purdueforlife.org) with questions
- Talking about board positions at club events such as game watches and networking events
- Inviting potential leaders to a board meeting

#### **Election Process**

- Option 1

- All constituents vote for each board position
- Nominations – can self-nominate or be recommended by another constituent
- Voting is done for all positions – officers, committees, general board members
  - Anonymous
    - Survey – best practice is a two-week voting period. The Clubs team can create the survey. Reach out to LeAnne if you need help with this
  - Open voting – in person or virtual – ballot/hand raise/yay or nay
    - Host a dinner or social event with a vote
    - Hold a special board meeting to vote and invite all constituents to vote
- Option 2
  - All constituents vote for general board members
  - Nominations – can self-nominate or be recommended by another constituent for the general board
  - Voting is done only for general board members
    - Anonymous
      - Survey – best practice is a two-week voting period. The Clubs team can create the survey. Reach out to LeAnne if you need help with this
    - Open voting – in person or virtual – ballot/hand raise/yay or nay
      - Host a dinner or social event with a vote
  - At the first board meeting, those elected vote on the specific board positions
    - Leadership – president, secretary, treasurer
    - Committees
    - Preferably the elected members will meet in person and elect positions by ballot or yay/nay hand raise
- Option 3
  - Only current board members vote
  - Nominations – can self-nominate or be recommended by another constituent
  - Voting is done for all positions by the board
    - Anonymous
      - Survey – best practice is a two-week voting period. Clubs team can create the survey. Reach out to LeAnne
    - Open voting in-person or virtual – hand raise/ballot/yay or nay
      - Host a dinner or social event with a vote
      - Hold a special board meeting to vote

#### **Board Members Stepping Down – President/Secretary/Treasurer**

- Club can utilize one of the Options to hold an election to replace the outgoing leader
- If there was a survey, consider using that to reach out to nominees who weren't elected
- Board can elect from the existing board – Option 3
- Can work with Clubs team to send an email call for volunteers for the position
  - Hold a callout in person to find a new volunteer
- Utilize an email request, newsletter, and social media posts to include a blurb for people interested in joining the board. Include contact information for a current board member to contact with questions or to learn more about what is involved
- Other board members stepping down – events chair or social media chair
  - Do you need to replace or can another board member cover for the rest of the fiscal year
  - If you want to replace, see the options above

#### **Involving Young Alumni**

- Young Alumni board position
  - Consider adding to your board
  - Good resource for social media platforms

- Engaging with other young alumni who may be new to the area
- Create a “welcome to the area” document to include things such as where to live/dining/things to do, etc.
- Networking events to share life after Purdue experiences
- PASE (Purdue Alumni Student Experience)
  - Consider working with a PASE student – inviting them to a board meeting
  - They can provide ideas/suggestions on send-offs and young alumni focused events
  - Mentorship opportunity for the young alumni board position to partner with a PASE student
  - Work with LeAnne or Susie if you are interested and we can connect you with PASE leadership

#### **PAA Membership – Board Leaders**

- PAA membership is required for all board members
- Leading by example – your actions set the tone for alumni engagement
  - Membership reinforces the value of membership and can inspire others to do the same
  - It strengthens the connection between leadership and the organizations mission
  - It directly supports club engagement and programming
- Engagement funds are based on the number of PAA members in a club area
- Membership benefits
  - Discounts at events
  - Voting rights for the Purdue Alumni Association and Purdue Trustees
  - Access to research databases
  - Discounts at University Bookstore and Follet’s Bookstore

## **APPENDIX D**

### **Clubs Opening Checking Account**

Banks require alumni clubs to provide their federal identification number to open a checking account. There is an easy on-line feature that allows the number to be obtained. See this site for additional information:

<https://sa1.www4.irs.gov/modiein/individual/index.jsp>

*What type of legal structure is applying for an EIN?*

Click on “View Additional Types including Non-Profit/Tax-Exempt Organizations” circular button.  
Then click on the “Continue” rectangular button.

*Additional Types - Choose the type you are applying for...*

Click on the “Other Non-Profit/Tax-Exempt Organizations” rectangular button.  
Then click on the “Continue” rectangular button.

*Please confirm your selection - Confirm your selection of Non-Profit/Tax- Exempt Organization.*

Click on the “Continue” rectangular button.

NOTE: This section provides an excellent differentiation between non-profit and tax-exempt status as explained below:

**What is the difference between non-profit and tax-exempt status?**

Non-profit status is a state law concept. Non-profit status may make an organization eligible for certain benefits, such as state sales, property, and income tax exemptions. Although most federal tax-exempt organizations are non-profit organizations, organizing as a non-profit organization at the state level does not automatically grant the organization exemption from federal income tax. To qualify as exempt from federal income taxes, an organization must meet requirements set forth in the Internal Revenue Code.

Why is the Non-Profit/Tax-Exempt Organization requesting an EIN?

Click on the “Banking Purposes” circular button.  
Then click on the “Continue” rectangular button.

NOTE: The sole reason for applying for the EIN is to satisfy banking requirements or local law.

Who is the Responsible Party for the Non-Profit/Tax-Exempt Organization?

Click on the “Individual” circular button.  
Then click on the “Continue” rectangular button.

NOTE: Do not click on the “Existing business” circular button.

You selected individual. Please tell us about the Responsible Party.

The following information must be provided and must match IRS records or the application will not be processed. We have tested this by entering false data, and we received immediate notification that records did not match and the application would not be processed. Information about the club leader should be entered:

First Name: Club Leader  
Last Name: Club Leader  
Social Security Number: Club Leader

The following question statement is also indicated: “I am a responsible and duly authorized member or officer having knowledge of this organization’s affairs.” Be sure to click on the “Yes” button associated with this statement. Do not click on the “I am a third party applying for an EIN on behalf of this organization.”

Then click on the “Continue” rectangular button.

Where is the Non-Profit/Tax-Exempt Organization physically located?

The following information must be provided:

Street: Club Leader  
City: Club Leader  
State: Club Leader  
Zip code: Club Leader  
Phone Number: Club Leader

The following question is also asked: Do you have an address different from the above where you want your mail to be sent? Click on the “No” circular button.

Then click on “Continue” rectangular button.

*Tell us about the Non-Profit/Tax-Exempt Organization.*

The following information must be provided:

Legal Name of Non-Profit/Tax-Exempt Organization: Purdue Club of XXXX

County where Non-Profit/Tax-Exempt Organization is located: Purdue Club of XXXXX

State/Territory where Non-Profit/Tax-Exempt Organization is located: Purdue Club of XXXXX

Non-Profit/Tax-Exempt Organization start date: Enter July 1 of current fiscal year

Then click on “Continue” rectangular button.

*Tell us more about the Non-Profit/Tax-Exempt Organization*

Various questions are asked about vehicles, gambling, excise tax, alcohol, tobacco, and employees. Click on the “No” circular button for each question, then click on the “Continue” rectangular button.

*What does your business organization do?*

Click on the “Other” circular button.

Click on the “Continue” rectangular button.

The next screen states “You have chosen Other. Please choose one of the following ... “

Click on “Other - please specify your primary business activity” circular button, and then enter “Promote scholarships and social activities.”

*How would you like to receive your EIN Confirmation Letter?*

Click on the “Receive letter online” circular button.

Click on the “Continue” rectangular button.

*Summary of your information*

A screen appears with basic information that has been entered. Confirm the information is correct, then click on the “Submit” rectangular button.

*Congratulations! Your EIN has been successfully assigned.*

A screen appears indicating the EIN will be provided and the legal name of the organization.

**Click on the “EIN Confirmation Letter” link, and the letter will be available via Adobe Reader. Print the letter for historical purposes.**

**Save the letter in an electronic format and provide a copy to Purdue for Life (PFL) for future reference. Be sure to save it before clicking on “Continue” and going to the next screen; otherwise, you will not**

**be able to save and retrieve it! Send the PFL copy to [finance@purdueforlife.org](mailto:finance@purdueforlife.org) and [alumniclubs@purdueforlife.org](mailto:alumniclubs@purdueforlife.org)**

Then click on the “Continue” rectangular button.

*Additional Information about your EIN*

A screen with basic information about the EIN will appear. The information states the EIN can be used to open a bank account, that changes to the organization must be made in writing to the address provided at <http://www.irs.gov/file/article/0,,id=111138,00.html>

## APPENDIX E

### **Club Leadership Directory**