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CHAPTER PURPOSE & ORGANIZATION

The University of New Mexico Alumni Association's (UNMAA) Groups and Chapters are established to create meaningful, beneficial connections between alumni and the University. The intent of this partnership is to ensure the continued excellence of The University of New Mexico (UNM) and the pride our alumni have in their alma mater. **Chapters and groups organize, develop regular communication and outreach programs and have an established working relationship.**

Article IV, Section 6 of the UNMAA Bylaws gives the Board of Directors the duty to charter alumni chapters, "The Board shall have the power to recognize and charter alumni chapters." All chapters exist to engage alumni in concert with the overall mission and goals of the UNMAA. The official recognition of a chapter symbolizes the formal partnership and mutual commitment between the chapter and the Association.

Geographic Chapters work with an alumni population defined by a geographic area (e.g. Dallas Alumni Chapter, Albuquerque Alumni Chapter, or NorCal Alumni Chapter). Chapter leadership will work in partnership with staff at the Alumni Relations Office.

Constituency Chapters work with alumni from special interest areas such as cultural, College/School, area of study, age group, student activity (e.g. Black Alumni Chapter, Honors Chapter, Veterans Alumni Chapter, Young Alumni Chapter). Constituency Chapters may also include Academic Affiliates currently supported by the academic organizational unit – usually the school or college.

Groups are alumni from a geographic area or constituency who have just begun to reach out to a defined population. Groups are a developmental start before becoming a recognized alumni chapter. During the development process, groups initiate communication, determine interest levels in activities, plan events and programs based on those interests. Groups are required to present a Developing Group Commitment Form, create an Annual Plan and provide an Annual Report of their activities to maintain group status and be eligible for Alumni Association support.

GOAL 1: TO FOSTER ALUMNI PRIDE IN THE UNIVERSITY OF NEW MEXICO

Pride in the University of New Mexico, its history, present achievements are at the core of the Alumni Associations every endeavor. This pride includes an acceptance and appreciation for the multicultural diversity of the student body, staff, faculty, and alumni of the University, an inherent part of the culture of our community. The importance of a strong alumni presence can enhance university life for students, thus adding value to the alumni presence in the future of UNM.

Objectives:

- Enhance awareness of The University of New Mexico and our alumni.
- Encourage alumni to visibly share their pride in having attended the University.
- Recognize outstanding alumni contributions to the University, their community, and profession.
- Continue to develop and support connections and activities that create pride in the University, its programs, and its people.
- Promote a positive University experience and strengthen enrollment efforts.

GOAL 2: INCREASE OPPORTUNITIES FOR ALUMNI TO SUPPORT, SERVE, AND USE POSITIVE INFLUENCE ON BEHALF OF THE UNIVERSITY OF NEW MEXICO AND THEIR COMMUNITIES

As representatives of their alma mater, alumni are a constituency who act as guardians of the heritage and achievements of the University. They are a natural source of support and service. Alumni and the University.

Objectives:

- Further develop groups and chapters through programs and opportunities uniquely available to them with social, professional, community service, and philanthropic activities.
- Involve alumni in reunion activities that showcase the University.
- Involve alumni in the institution's efforts to recruit and enroll students.
- Encourage alumni to promote UNM within their communities, professional fields and with prospective students.
- Provide opportunities for lifelong learning through access to University facilities, lectures, events, communication outlets and social media - as well as through interaction with their program, department or college/school.
- Develop a professional networking program or local welcome program for regional chapters.
- Encourage engagement in UNM activities and events.

GOAL 3: FACILITATE COMMUNICATION AMONG ALUMNI

Alumni have a great desire for knowledge about their alma mater and especially information about their degree and major area of study. In return, a strong alumni voice can have a positive influence on future students, support for the University, and educational goals. To this end, communication becomes all-important as we seek to improve the flow of information among alumni, UNM, and the larger community.

Objectives:

- Increase the flow of information to alumni through existing channels, including social media, emails, Mirage and Howler, and other communication methods.
- Utilize campus communications to inform the University community about the activities of the Association and the success of our alumni.
- Facilitate interaction of alumni with faculty, staff, and students.
- Inform alumni about the educational, research, and healthcare accomplishments of the University.
- Enhance visibility of the Association within the University community.

STANDARD OPERATING PROCEDURES FOR CHAPTERS AND GROUPS

1. Steps to form a new alumni group
 - a. Group representatives need to contact the UNMAA and meet with staff.
 - b. Group defines membership and works with Alumni Association staff to identify possible members in alumni database.
 - c. Group and Alumni Association staff develop, distribute and analyze survey of interest to group identified.
 - d. Based on survey results, the group proposes plan for the year and recruits additional alumni involvement in the group's planning and activities.

2. Steps for Board approval of a new chapter
 - a. Submit a formal request for a chapter from the group leader. The request must include a full description of the mission and goals of the proposed chapter, a summary of group activities in the last two years and a plan for its continued growth and leadership development (as reported in their Annual Report)
 - b. A petition containing at least ten signatures from area alums, indicating their intention to be involved with the chapter.
 - c. A successful track record as a group in good standing (as defined in Standard Operating Procedures)

3. Who is included in the group or chapter?
 - a. For regional groups and chapters, any alum (degreed/non-degreed) living within the geographic area specified for that group can be considered a member of the group or chapter.
 - b. For constituency (special interest: cultural or academic) groups and chapters, any alum (degreed/non-degreed) interested in advancing the mission of the group or chapter can be considered a member of the group or chapter.
 - c. No alum or friend of the University shall be excluded from participating in an activity of any group or chapter of the UNMAA.

4. Chapter Leadership
 - a. Chapters are encouraged to maintain a leadership team of at least three members whose purpose is to provide oversight and operations of the group.
 - b. Chapters may expand the leadership teams as necessary to meet the needs of the chapter. (*See Leadership Team Roles & Responsibilities, p.20.*)

5. Group Leadership
 - a. Groups are encouraged to maintain a leadership team of at least three members whose purpose is to provide oversight and operations of the group.
 - b. Groups may expand the leadership teams as necessary to meet the needs of the chapter.

6. Chapter Leadership Terms

- a. Term of Service
 - i. Unless otherwise specified; members of the leadership team shall be appointed to a two-year term which is renewable based on the recommendation of chapter leadership in consultation with UNMAA.
 1. Ideally, new officers should be chosen through appointment or vote by the end of the academic year to enable leaders to attend the annual Chapter Council meeting.
 - ii. Chapters are encouraged to have regular change of leadership to increase opportunities for alumni involvement.
- b. Filling Vacancies
 - i. The chapter leadership teams can fill vacancies throughout the year as necessary.
 - ii. Notice of a vacancy and *prior notice* of the fulfillment of that vacancy must be given to the Alumni Relations Office
- c. Leadership Affiliations
 - i. Members of Chapter/Group Leadership holding official positions such as Chapter President/Chair, Treasurer, etc. **Must** be a UNM Alum.
- d. Recruitment
 - i. Chapters/Groups should maintain ongoing recruitment and expansion of engaged alumni and transition of the leadership team as needed.

7. Expectations for Chapters/Groups

- a. Submit an Annual Plan and projected expenditures for the upcoming fiscal year (7/1 - 6/30) in accordance with the UNMAA budget cycle and approved by the UNMAA Board of Directors.
- b. Chapters/Groups should host at least four leadership meetings each fiscal year.
- c. Chapters should host three programs or events each fiscal year; groups should host two programs or events each fiscal year.
- d. Submit the updated Master Budgeting and Planning Sheet and any documents necessary for financial reconciliation within two weeks of any event that utilizes group or chapter funds.
- e. A Chapter Council Meeting will be held annually for the Chapter/Group Leader(s).
- f. Support the mission and goals of the UNMAA and comply with all policies of the Association and its Board of Directors.
- g. If the Chapter/Group is not in compliance with these standards, the UNMAA shall review its status and make recommendations. In cases where a Chapter/Group cannot meet expectations, the UNMAA may move the group/chapter to inactive status. To reactivate, the organization will follow the new group development process.

- h. Upon term renewal and/or election results, the officers/leadership team will agree on minimum participation expectations for all members of the leadership (i.e. meeting attendance and absences, event coordination and participation). Members who do not fulfill the expectations as agreed upon for the year will be asked to reconsider their commitment to the leadership role.

8. Funding

- a. Chapter/Groups may receive a basic operating funding allocation by the ARO based on the annual budget of the Association dependent on the approval of the Annual Plan (see above).
- b. All Chapter/Group expenditures of UNMAA funds must adhere to the Funding Policies and Procedures and events outlined in their annual plan.
 - i. All expenditures must be spent in support of the Chapter/Group mission in accordance with the guidelines laid out in *CHAPTER/GROUP FUNDING POLICIES AND PROCEDURES (p.15)*
- c. Non-fundraising revenue generated by Chapters/Groups through event registrations and other non-gift related transactions, will go into the UNMAA or UNM Foundation accounts according to arrangements made within the Funding Policies and Procedures.
 - i. Specifically, chapter budgets cannot be replenished through these transactions.
- d. Chapters/Groups are prohibited from maintaining outside bank accounts. All financial transactions and deposits must be managed through UNMAA or UNM Foundation accounting systems.
- e. University Administrative Policy 1040 states fundraising dollars are to be deposited in an account at the UNM Foundation and will be managed in accordance with UNMF policies and procedures. This includes funds raised to support scholarships, lectures and programs.
- f. Scholarship funds will be awarded through the UNM Office of Financial Aid and disbursed directly to student bursar accounts.

9. Meeting Procedures for Chapter/Group Leadership

- a. Chapters/Groups should host at least four leadership meetings each fiscal year.
- b. Chapters should host three programs or events each fiscal year; groups should host two programs or events each fiscal year.
- c. All groups and chapters of the UNMAA will operate under the guidelines, policies and procedures established and approved by the UNMAA, including but not limited to:
 - i. Standard Operating Procedures
 - ii. Funding Policies and Procedures
- d. Submit meeting minutes to UNMAA within two weeks of the meeting.

10. Insurance

- a. Chapters are afforded coverage under the Alumni Association insurance and liability policies for chapter volunteers and events. (The cost of high-risk event insurance for single events may be passed on to the chapter on an event by event basis depending on the nature of the event and cost of the single event insurance coverage.)
 - i. It is the responsibility of the individual chapter to submit current rosters of volunteers (and changes when necessary), calendar of meetings, programs and events to insure coverage of chapter activities). Much of this information can be provided by submitting event reports and participation sign in sheets.
 - ii. Alcohol Insurance may be required (will be determined by the ARO on a case by case basis)

11. Dissolution of Chapter/Group

- a. Chapter/Group standing will be reviewed on an annual basis. If a determination is made that chapter/group should be suspended/dissolved, the ARO will discuss the process with the chapter/group leaders.
- b. Chapter/Group shall receive notice of an impending suspension or dissolution from the UNMAA and shall have 60 days in which to respond.
- c. If the Chapter/Group does not respond to the suspension notice within 60 days, the charter shall be formally suspended.
 - i. In case of dissolution, the assets of the chapter/group shall be used to retire any indebtedness, and thereafter, shall be absorbed into the UNMAA Budget.
- d. Chapter/Group leaders who respond to the notice within the 60-day period must submit a proposed reactivation plan for approval by the UNMAA Board of Directors at its next regularly scheduled board meeting.
 - i. If the reactivation plan is approved, the chapter's charter will be restored. Funding support will be determined on a case by case basis.
 - ii. If the reactivation plan is *not* approved, the chapter's charter will be terminated along with any funding/support from the UNMAA.
- e. Suspended Chapters/Groups may petition the UNMAA Board of Directors for active status.
 - i. The Board of Directors will designate a representative (ARO Staff or Board Member) to work with the group to meet the expectations outlined in Chapter/Group Guidelines.

STARTING A GROUP OR A CHAPTER

The purpose of developing a group or chapter should be:

- To establish a mutually beneficial relationship between The University of New Mexico, its alumni and friends within an interest group or region.
- To recruit and facilitate connections between alumni and supporters of The University of New Mexico.
- To sponsor and support programs and activities that will enhance the image and mission of The University of New Mexico.

To gauge interest in the group or chapter, we suggest the following procedures:

- Alumni Association will receive and gather requests from alumni interested in forming a constituency or regional group.
- Interested alumni will work with the Alumni Association to create a survey or interest letter to be emailed to all alumni in the defined area. Surveys will explore interest in various social events, career development, recruitment, community service and communication preferences.
- Use the survey results and assistance from the Alumni Association to identify activities of interest, as well as to assess alumni interested in leadership and supporting roles.

Creating a constituency or regional group

- Interested volunteers will be assigned to an Alumni Association staff member who will be a liaison to the constituency or regional group.
- The staff members will schedule regular communications with constituency and regional representatives to discuss chapter expectations, brainstorming, and alumni goals. These communications can be phone calls, meetings and email exchanges.
- Each representative will sign the Developing Group Commitment form and submit to the Alumni Association staff liaison with a list of alumni interested in the group.

Launch an alumni interest event

To ensure that sufficient volunteer support exists in an area before establishing a group, the developing group leaders should first organize an event to gauge interest.

- Based on alumni survey results, set a date, time and location for a launch event to gauge interest from the group. Determine program for the event.
- Complete an Event Proposal Form to submit to the Alumni Association ideally 12 to six weeks prior to the event to allow for appropriate marketing.
- Monitor RSVPs for the event to determine if additional marketing is needed.

- Following the event, schedule a follow-up meeting or communication with the Alumni Relations staff liaison and submit an Event Report.
- Plan at least one other event from a different programming area (e.g. career networking, community service, social, etc.).
- Funding is available on a case-by-case basis for launch events.

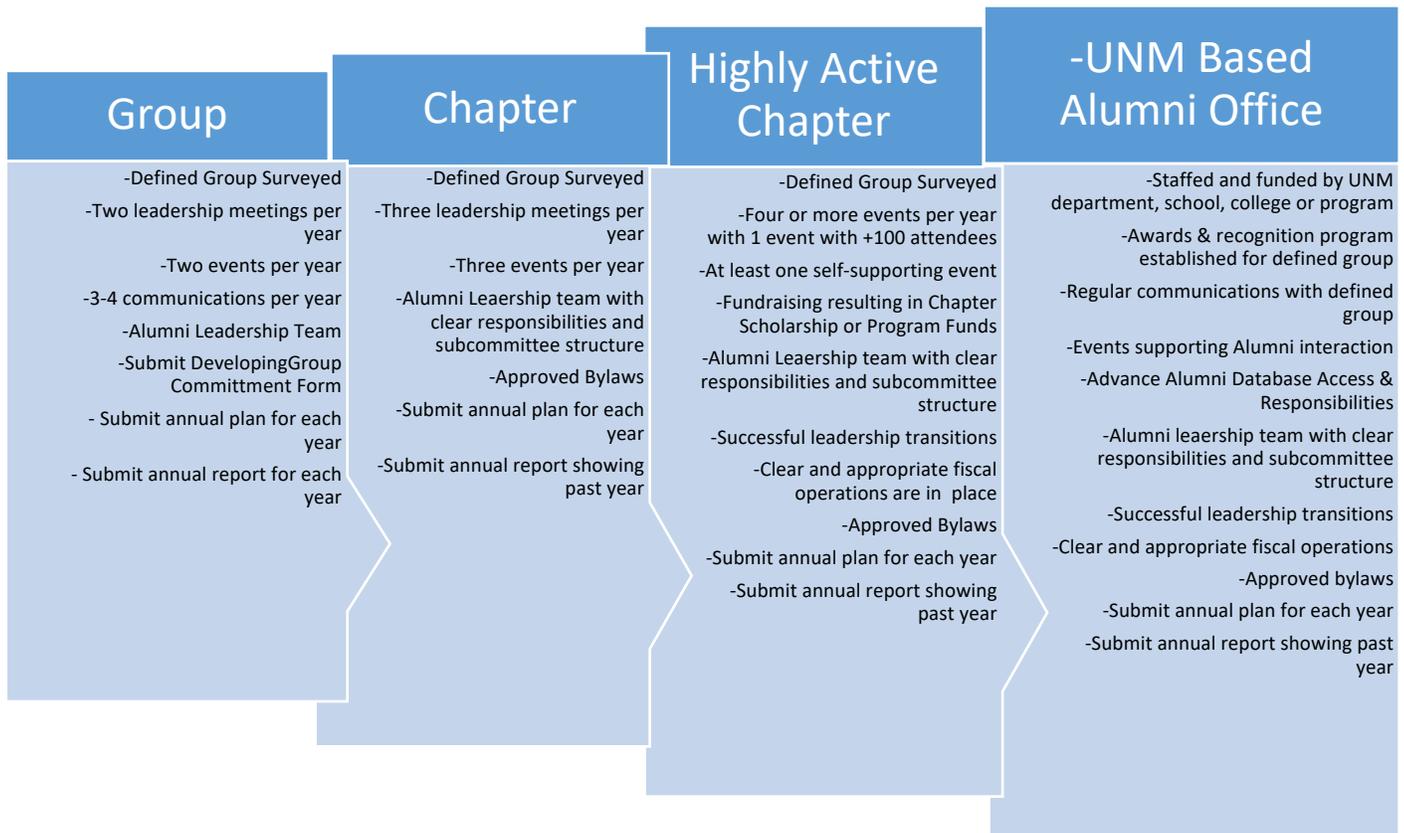
Becoming Chartered

Once your group has been established, complete the following requirements to be considered to become a chartered chapter:

- Recruit and maintain an active leadership team that shows consistent participation and depth to allow transfer of officer responsibilities.
- Provide the Alumni Association with contact information of involved alumni.
- Hold at least two leadership team meetings per year.
- Hold a minimum of two events incorporating any of the following programming areas:
 - Career networking (networking receptions, etc.)
 - Social (Lobo Day, social gatherings, sporting events, university updates, etc.)
 - Fundraising in support of scholarships, lectures and programs (green chile roasts, silent auctions, etc.).
 - Community service
- Submit an Event Report within two weeks, including
 - Final attendance list
 - receipts (if applicable)
 - photos (if available) to the Alumni Association.
- Show consistent interaction on social media or other communication platforms.
- Maintain communications with the Alumni Association at least once a month.
- Establish bylaws reviewed by the Alumni Association Executive Committee and approved by the Alumni Association Board of Directors.

If all the requirements are completed, a group can apply to be chartered by the Alumni Association. To aid in the success of groups and chapters, the Alumni Association will provide support and resources as time and abilities permit.

Continuum of Activity Levels:



Continuum of Staff Support:



COMMUNICATION & MARKETING SUPPORT

Purpose:

To streamline communication between the UNMAA its chapters/groups and members including all communication related to the projects, events, and planning.

Strategy + Consistency:

The UNMAA Communications and Marketing strategy hinges on delivering pertinent information to our Alumni and various stakeholders through intentional, thoughtful, timely, and purposeful messaging.

All requests for communication should include:

1. Alumni logo and/or chapter logo – Who is hosting?
2. Call to action – What are we asking them to do?
3. Time and date – When can they participate?
4. Location and address – Where will this happen?
5. Event details – Why should they take action?
6. Web address with more information
7. Contact information for event organizers

Marketing Plan:

To communicate with our alumni about programs, benefits and events, a marketing plan ensures we stay on strategy and consistent with branding and style. Chapter/group leaders should contact their ARO staff liaison as soon as they know of an event that will need marketing support to allow time to build a plan and design pieces to support its implementation.

What a marketing plan does:

1. Answers who, what, when, where, why and how?
2. Establishes strategy and a call to action.
3. Outlines what collateral needs to be created.
4. Builds stronger communications through organization.

Marketing & Communications Toolkit:

The UNMAA has a marketing toolkit to help support the communications for programs and events. We can also help you establish a toolkit for your community outreach needs. What is in the toolkit:

1. All events will require a completed “Alumni Chapter & Group Event Planning Form” which will be completed by ARO Staff members in collaboration with chapter/group leaders.
2. Graphic design and collateral creation – Does your event need social media graphics, a flyer, poster, brochure, etc. before we start communicating to the masses?

3. Social Media – This includes Facebook, Twitter and Instagram and each chapter/groups Facebook page. Chapter/group events are promoted on their social media pages ONLY
 - a) The University of New Mexico Alumni Association has multiple social media accounts and Groups to further connect with our Alumni.
 - b) We wish to promote effective communication and maintain a respectful dialogue in the social sphere. In that spirit, our commenting and moderation rules will maintain a productive and open forum for community discussion. Our social media channels are intended for community discussion among University of New Mexico Alumni, but non-Alumni are welcome to comment.
 - c) Moderators may remove or redirect comments that contain:
 - d) Content that is off topic or not within the scope of the responsibilities of The University of New Mexico Alumni Association
 - e) Abusive, profane or insulting language
 - f) Attacks on individual character or to the personality of individuals
 - g) Commercial endorsements of products, services, organizations or other entities
 - h) Political endorsements of parties, candidates or groups
 - i) Content that infringes on copyrights
 - j) Substantially repetitive content
 - k) Solicitations of funds
 - l) Speculative comments on any ongoing investigation
 - m) Content that implies, promotes or encourages illegal activity
 - n) Sexual content
4. The Howler – Send your event information to 130,000+ alumni on the first Thursday of the month. *Requests for communication in the Howler needs to be delivered to ARO staff no later than the 15th of the month PRIOR to the desired date of publication.*
5. Mirage Magazine – If you know your event date six months before (at minimum) and can get the relevant information to the ARO Staff in that timeframe it can be added to the Mirage calendar. *Absolute deadlines for inclusion are June 1 and January 1 of each year; issues go to print on February 1 and August 1 of each year.*
6. Broadcast emails – Communications that are sent to targeted alumni email addresses. *Must be requested a minimum of two weeks in advance.*
7. Publicity – Press releases can be created and sent to local media for event coverage. *Must be requested a minimum of two weeks in advance.*
8. Community calendars – Local community calendars typically let you post your event for free. *Provide as much advanced notice as possible.*
9. All communications with other University entities (i.e. Coaches, Deans, etc) need to be coordinated through ARO Staff.

Marketing and Communication Timeline:

1. For large events: Four to six months ahead of the event - create marketing plan in collaboration with ARO Staff.
 1. These include awards ceremonies, formal dinners, or other UNMAA signature events.
2. Two to three months before: work with ARO staff to ensure completion of “Alumni Chapter & Group Event Planning Form”
3. For **ALL other** events: Minimum six to eight weeks prior - update website, create RSVP forms/email confirmation(s), build all design & collateral pieces
 1. Exceptions may include watch parties for athletic events, invited/guest lectures, and networking/happy hours.
4. Three months before: Communicate save-the-date information.
5. One to two months before: Request broadcast email(s) and generate social media buzz
6. Within one month of the event: Send reminder email(s) and answer any FAQs, send press release(s), continue use of social media.
7. Day to week following: Post a recap on social media and any photos from the event; say thank you.

Ultimately, if an event is planned outside of these timelines, ARO staff will work to support and publicize said event but will not be able to provide all the services mentioned above. (*Timelines surrounding email specifically MUST be adhered to in order to ensure compliance with University broadcast email guidelines.*)

Branding:

Branding is the process by which UNM develops a cohesive identity. Everything from text, to photos, logo placement, and color schemes are all a part of the University’s brand. (*Visit the UNM Alumni website for brand standards and guidelines.*)

1. Chapters/groups wishing to create their own collateral must submit for review by ARO staff.

Event reporting:

Within two weeks of the event, please submit an Event Report and be sure to include the following information:

1. Who attended? Send us your sign-in sheets with photo release.
2. How many people attended?
3. Send survey to attendees. (Let us know what you want to know, and we will create the survey.)
4. During events it is important to generate content that will help build interest and show others what a great job your chapter/group did in putting them together. This means **please take photos** and gather names if possible!

CHAPTER/GROUP FUNDING POLICIES AND PROCEDURES

All UNMAA chapters/groups are required to work with ARO staff to manage their finances through the UNMAA and UNM Foundation. *Chapters/groups are not permitted to have separate bank accounts.*

All Alumni chapters/groups may receive a designated operating budget for each fiscal year from the UNMAA dependent on board approval. In addition, chapters/groups may also work with ARO staff in coordination with the UNM Foundation to establish a scholarship fund.

Approval and use of UNMAA Operating Funds

The UNMAA may provide each group and chapter operating funds to support their alumni engagement efforts.

1. **Use of these funds must be approved by chapter/group leadership in coordination with their designated Alumni Relations Officer prior to the expenditure of any funds:**
 - a. Chapter/group leadership will work with ARO staff to track use and obtain approval of all expenses.
 - b. Vendors can be paid directly by providing invoice and contact information to ARO Staff via email.
 - c. Accounting for chapter/group funds will be managed by ARO Staff and budget reconciliations will be available for the chapter/group upon request.
2. **Reimbursements**
 - a. All reimbursement requests must be accompanied by an itemized invoice/receipt.
 - b. All invoices/receipts must be provided to ARO staff within 10 calendar days of the event. This is typically done by email, but alternative methods such as text messaging can be used at the discretion of a chapter/groups Alumni Relations Officer.
 - c. Pre-planning for expenses is a good way to avoid spending personal funds and waiting for reimbursement.
 - d. All receipts and invoices must include a signed authorization from the chapter/group president.
 - e. **Once a reimbursement request is received by ARO Staff, a reimbursement will be issued within 15 business days.** (Reimbursements *will* take longer if the request is missing information or the request did not properly follow protocol.)
3. **Funds must be used within the fiscal year, July 1st – June 30th and do not “rollover” into the next budget.**
 - a. Any expenses that received by ARO Staff after June 15th will be taken from the next year’s allocated budget. If you anticipate an expense between May 31st and June 15th, be sure the office is notified in advance.

- b. Funds allocated and provided to the chapters/groups operate like any other fiscal year budget. The funds do not accumulate if you do not use them at the end of the fiscal year and will revert to the Alumni Association.
4. **Funds are to be used for alumni engagement only and must further the mission of the chapter/group:**
 - Food/drink for events
 - Alcohol can be covered but should be limited and should include food to reduce liability.
 - Alcohol must be served by a licensed professional
 - Only Alumni Chapter/Group members and their invited guests (who must have ties to UNM) are permitted to attend
 - Space rental and tickets/entry fees for an event
 - Catering and other food related expenses
 - Marketing/promotional items
 - Speaker fees/Travel expenses for speakers
 - Mailing and postage fees
 - Awards and recognition
 - Recognition for members of chapter/group or other UNM faculty/staff must be approved ahead of time by ARO staff and must fit the guidelines outlined above.
5. **Funds cannot be used for:**
 - Payment for a volunteer's time and service
 - Monetary contributions to other charitable groups or nonprofits
 - Any expense that is not clearly in support of the mission of the chapter/group.
 - Any expense that does not receive prior authorization from ARO Staff.
6. Fundraising and events generating funds:
 - a. The only funds that can be generated or realized by a chapter/group are those meant to specifically raise funds for a scholarship

We encourage chapters to build in an event charge for their guests at events. This will help to subsidize your funding or outright pay for the event without affecting your funding. Due to the variety of fundraising events and activities, we do not recommend asking for sponsors for events.

The UNMAA will aid with RSVP and registration forms as needed and as timing allows in the Marketing and Communications Guidelines. Advance planning is required for assistance. If tickets for the event include an amount greater than the value the alumni receive (i.e. if the

dinner costs \$30 but the ticket is \$50), the Alumni Association will track and credit the donor for the contribution.

Payment options for events are:

- Checks can be addressed to the UNMAA. They should be mailed or delivered to the Alumni Relations office for processing and deposit. The office can provide postage paid envelopes to chapters for mailing checks.
- Credit card payments can be made in online RSVP forms with the funds going through the Alumni Association's Online Community.
- Credit Card payments can be processed through PayPal. Highly active chapters can be provided with "swipers" for credit card payments onsite.

The most common fundraising events are Green Chile Roasts and Lobo Day events.

7. Tracking raised funds and contributions:

Federal law requires that contributions be receipted for tax purposes. The University of New Mexico requires that the UNMAA and Alumni Relations Office be audited annually to assure best practices with fiscal management. By following these Funding Policies and Procedures, groups and chapters can be assured they follow Federal law and University requirements. This protects the groups, chapters, the Alumni Association and The University of New Mexico.

The UNMAA will maintain financial tracking for the groups and chapters. UNMAA will create holding accounts through the UNM Foundation for each chapter that raises funds through a program event (other than direct contributions) and can be used for awarding scholarships. Established chapter scholarships have online giving pages on the UNM Foundation website to donate directly to the scholarship fund. UNMAA can forward donations made by check to the UNM Foundation for processing. These accounts will be transparent and accountable to chapter/group leadership and the UNMAA Board of Directors.

UNM Foundation Funds

Chapters/groups are encouraged to raise funds for The University of New Mexico programs and scholarships. Each chapter/group can decide their fundraising priorities – what scholarship or program at UNM they wish to support. For example, Honors Chapter might decide to raise funds for the program or for a specific student scholarship.

All funds raised will be processed through the UNM Foundation. The UNM Foundation was created to raise and manage funds for the benefit of The University of New Mexico. Chapters/groups will create either (a) a Non-Endowed fund to support either a specific scholarship or program, or (b) an Endowed fund to support a specific scholarship or program. *(see below for further details on the differences between Non-Endowed and Endowed funds)*

- Gifts to the University of New Mexico Foundation, a 501(c)(3) charitable organization, are fully tax-deductible to the extent allowed by law.

The UNM Foundation can set up accounts with online giving pages. The chapter/group works with their Alumni Relations Officer -who in turn works with the UNM Foundation- to define the legitimate uses for the funds in accordance with University policies and procedures. Funds are usually raised to support:

- Scholarships
- Program Support
- Public Service (KUNM, NM PBS (KNME), UNM Hospitals)
- Buildings
- Research
- Lectures
- Endowed Professorships, Chairs or Deans

Option 1: A non-endowed fund for a program or scholarship – funds are received and receipted by the Foundation and ARO Staff then ensure the transfer/awarding of funds to the UNM school, college, program, or student (if scholarship) chosen for support. The program/student can then spend the funds according to the University’s policies and procedures.

Option 2: An endowed fund can be set up with a minimum of \$25,000 (amount subject to change) When the funding minimum is reached, a spending distribution from the fund is created and available for use. Distributions can also be reinvested for a specific length of time to increase the endowment principal.

All new non-endowed/endowed funds require completion of the UNM Foundation’s fund establishment form. Endowed funds also require a gift agreement. Please work with your Alumni Relations Officer to complete these steps and before embarking on a fundraising campaign.

CHAPTER SCHOLARSHIPS

UNMAA Regional Chapter Scholarships

Several UNMAA regional chapters have raised funds through Annual Green Chile Roasts and other fundraisers to establish UNM Foundation funds (both endowed and non-endowed). These fund scholarships for students, some require that a student be living in or from the chapter area. Chapters with scholarship programs must establish a scholarship committee (3 or more members OR 2 members and the Alumni Relations Officer) to review and award applicants. Applications for chapter scholarships open in September each year for incoming freshmen, transfer students and current students.

Any chapter soliciting scholarship monies must ask that donations be made using the online giving page (listed below) or that the gift be in the form of a check payable to the UNM Foundation (with a note indicating fund designation). This process ensures that funds end up going to the donor's desired program/scholarship, and that receipts can be issued by the UNM Foundation.

All online giving pages can be found at unmfund.org by searching under:



LEADERSHIP TEAM ROLES AND RESPONSIBILITIES

President | Manager | Chapter/Group Leader

- Represents UNM and the UNMAA with pride and integrity.
- Primary contact for the group or chapter – maintains two-way communications with designated Alumni Relations Officer or ARO staff member(s).
- Chairs all group or chapter leadership team meetings.
- Shares important updates and reminders from UNMAA with leadership team.
- Formulates and distributes the agenda prior to each chapter/group meeting.
- Attends the annual UNMAA Chapter Leadership Council Meeting. Leaders can work with ARO staff to book travel, or they may be reimbursed up to \$500 for airfare. In the event the chapter leader cannot attend, the chapter leadership team (board) selects an alternate member and the same travel policy applies.
- Collaborates with designated Alumni Relations Officer or ARO staff member(s) on initial draft of the Chapter/Group Annual Plan.
- Ensures chapter/group updates are submitted in a timely fashion to the ARO Staff for inclusion in The Howler, the Alumni e-newsletter (minimum 30 days in advance of the next issue).
- Ensures chapter/group updates are submitted in a timely fashion to the ARO Staff for inclusion in the Mirage, the Alumni magazine. (Published May 1 and December 1).
- Ensures chapter/group meets expectations laid out by UNMAA Chapter Guidelines: Standard Operating Policies and Procedures (p. 5).
- Ensures adherence to all communication and marketing standards per UNM Communications and Marketing (UCAM) and UNMAA policies. *(Please work with your designated Alumni Relations Officer or ARO staff member to ensure that all chapter/group collateral meets these standards).*
- Responds to inquiries from alumni and other entities regarding the chapter/group activities.
- Assists designated Alumni Relations Officer or ARO staff member(s) in conducting leadership elections. This includes being responsible for soliciting nominations and working with staff designee to schedule or set election deadlines.
- Should attempt to remain up-to-date and informed about current events and new developments within the University community and the UNMAA.
- Ensures that minutes are taken during chapter/group meetings and prepares summary and sends to designated Alumni Relations Officer or ARO staff member(s) within two weeks of meeting.

- Ensures the Event Report is submitted to designated Alumni Relations Officer or ARO staff member(s) following each chapter/group event.
- Responds to the requests of alumni regarding events they would like to see the chapter/group involved in.
- Monitors chapter/group webpage with designated Alumni Relations Officer or ARO staff member(s) and submits requests for updated content when appropriate.
- Tracks chapter/group expenses.
- Solicits updates from designated Alumni Relations Officer or ARO staff member(s) at least one week prior to meeting if needing confirmation on expenses and budget information.
- Informs designated Alumni Relations Officer or ARO staff member(s) of any income collected by the chapter/group at events or fundraisers and sends with appropriate documentation to UNMAA for deposit at the UNM Foundation.

Potential Leadership Positions, Committees, or Designees:

Community Service Coordinator

- Coordinates logistics for group or chapter participation in local community volunteer projects.

Social Media Coordinator

- Manages group or chapter social media presence.
- Takes photos at events.

Fundraising Coordinator

- Coordinates events to raise funds for chapter funds/endowments.
- Ensures individual donations are made directly to the UNM Foundation.