

MUW ALUMNI ASSOCIATION CHAPTER & CONSTITUENCY GROUP GUIDELINES

Originally Adopted February 2, 2019
AMENDED May 17, 2021

The Mississippi University for Women Alumni Association (MUWAA) serves and supports the University by involving alumni and friends with each other and MUW. MUWAA Chapters & Constituency Groups have a longstanding history of linking the alumni, affectionately known as the Long Blue Line, and the University. Joining an Alumni Association chapter or constituency group is one of the best ways to connect alumni across the nation and around the world. Alumni chapter & constituency group members are able to participate in a variety of activities to promote and build support for our University. This includes hosting alumni meetings, increasing positive public awareness of MUW, raising money for scholarships and University support, and assisting in student recruitment. Since these groups are voluntary, minimal guidelines are suggested to encourage their formation and to be able to tailor each chapter or constituency group to their needs and style.

From time to time, the MUWAA will update these Guidelines. The most recent version can always be found on the website, <https://longblueline.muw.edu/alumni/alumni-association>. The Office of Development and Alumni staff is available to help make MUWAA Chapters & Constituency Groups a successful partner of the MUWAA and the University. Contact information is:

MUW Office of Development & Alumni
1100 College Street, MUW-10
Columbus, MS 39701-5800
Telephone: (662) 329-7295
Fax: (662) 329-7466
E-mail: developmentandalumni@muw.edu

I. CHAPTER & CONSTITUENCY GROUP ORGANIZATION

A. Chapter & Constituency Group Types: When forming an alumni group, there are four options available based on the composition of the members and structure desired.

- 1. Formal Chapters** - Groups of alumni within a certain geographical area who choose to elect officers, collect dues, and offer several opportunities throughout the year for alumni in their area to gather and/or support the University.

2. **Informal Chapters** - Groups of alumni within a certain geographical area who prefer to not have officers or collect dues but rather have designated leader(s) whose only role is to coordinate occasional gatherings in the area. These chapters may choose to have only one formal or informal gathering per year but can have more if their members desire.
3. **Formal Constituency Groups** - Groups of alumni who may live all across the nation or even around the world but share a common bond from their time at MUW or beyond. This may be a group from a specific major, social organization, graduation year(s), sport, etc. These formal groups have officers, and may choose to collect dues, and plans events supporting their special interests at the University. These groups may also choose to have their own bylaws which govern their group, but these bylaws may not supersede or contradict the Affiliation Agreement, MUWAA Bylaws approved by the overall body of MUWAA members, MUWAA Policies and Procedures, and the University.
4. **Informal Constituency Groups** - Groups of alumni who may live all across the nation or even around the world but share a common bond from their time at MUW or beyond. This may be a group from a specific major, social organization, graduation year(s), sport, etc. These informal groups do not elect officers or collect dues. They may only choose to gather informally at certain events or may even choose to be solely a virtual group who connects exclusively through a social media page set up specifically for their group.

B. Chapter & Constituency Group Establishment: There are three steps to begin organizing a chapter or constituency group.

1. Contact the Office of Development and Alumni with your request.
2. For Chapters, submit to the Office of Development and Alumni a list of counties and major cities and towns within a 75-mile radius of your community for a survey of alumni within this radius. Results, which typically take four to six weeks, will identify people who may be interested in becoming involved. For Constituency Groups, submit to the Alumni Office the specific type of alumni you are targeting (i.e., graduated with a degree in a certain major, was a member of a specific organization, or graduated between these years) for a survey of the number of alumni the University has on file who may fit your criteria.
3. Once the queries are completed, the Office of Development and Alumni will contact the requesting party to let them know the results. If enough potential alumni are identified, the requesting party will then draft a letter to be sent by the Office of Development and Alumni via email to all those found during the query. This letter should explain what type of group the requesting party is wanting to form and give the recipients details about how to get involved.

While the above steps are available to aid in the formation of a new chapter or group, it is not mandatory these steps be followed. Groups may choose to begin more informally through word of mouth or some other means.

C. Chapter & Constituency Group Maintenance: To be considered an official Chapter or Constituency Group with the University, the following criteria is suggested.

1. An annual Chapter/Constituency Group Status Report should be submitted to the Office of Development and Alumni each fiscal year on or before July 1. A template of this report can be found at Exhibit 1 at the end of these guidelines or ask for a digital one from the Office of Development and Alumni. This report is brief and should require no more than thirty minutes to complete. The report should include names, mailing addresses, phone numbers, email addresses, and terms of service for all officers and directors, if any. Submission of this report allows the Office of Development and Alumni to keep the Chapter & Constituency Group webpage up to date with current group contact information so alumni visiting the webpage can know what groups are available and who to contact to get involved.
2. After each chapter/group event, the President or designated coordinator should prepare a brief summary of the event and send to the Office of Development and Alumni with the information contained in Exhibit 2.
3. For Formal Chapters, the following is also suggested.
 - a. **Officer Structure:** At a minimum, Chapters should consider electing a president, president-elect/vice-president, secretary, and treasurer. All officers should be active members of the MUW Alumni Association and should be elected by a majority vote of membership at an annual meeting. The following responsibilities are suggested but not limited to:

President

- Ensures the Chapter operates in partnership with the MUWAA, the University, and the MUW Foundation
- Maintains communication with the Office of Development and Alumni in coordinating all activities and communications
- Serves as Chair of the Chapter Board of Directors
- Presides over all Chapter and Board meetings
- Directs the planning of all Chapter activities

President-Elect/Vice President

- Assists President in all aspects of program planning

- Chairs committees or oversees projects as assigned by the President
- Performs duties of the President in his/her absence

Secretary

- Chairs the membership committee
- Monitors alumni lists and notifies the Alumni Office of changes in addresses, phone numbers, email addresses, births, deaths, marriages, etc.
- Other duties as assigned by the President
- Maintains minutes of Board and Chapter meetings

Treasurer

- Keeps financial records
- Serves on the Chapter fundraising committee and works with the Office of Development in all aspects of fundraising
- Secures approval for expenditures from Chapter Board of Directors
- Responsible for processing Chapter bills for payment

b. Terms of Office: Excluding the office of treasurer, all officers should serve a term of no more than two years.

c. Board of Directors: The Chapter President can appoint members to the Board of Directors. It is suggested that the Board consist of the elected officers, the immediate past president, and six (6) appointed members. All members should be active, voting members of the Chapter and a diverse representation of alumni in terms of age, race, and gender. The Board should ensure all business affairs are managed to support the MUW Alumni Association, the MUW Foundation, and the University.

d. Chapter Committees: Chapters, depending on their size, may maintain committees such as Recruitment, MUWAA and Chapter Membership, Scholarship and Fundraising, and Community Service and Publicity.

D. Chapter & Constituency Group Funds: Each Chapter and Constituency Group which elects to collect dues or donations has the choice to maintain these funds in a designated fund within the MUW Foundation or a bank account with an outside institution.

1. If the Chapter or Constituency Group chooses to maintain an outside bank account, it is preferred that they follow these guidelines which provide benefits for the Chapter/Constituency Group and the donor.

- The bank account should be opened in the Chapter or Constituency Group name with the MUW Foundation's federal identification number. The Foundation will be the "owner" of the account. The check register and checks are held by the Chapter/Group treasurer.
 - Signature authorities on the bank account are to include Chapter/Group President, Chapter/Group Treasurer, and Executive Director of the MUW Foundation.
 - Two signatures are required on disbursements over \$500.
 - Bank statements are to be mailed directly from the bank to the MUW Foundation and to the Chapter/Group treasurer. (MUW Foundation, 1100 College Street, W-1618, Columbus, MS39701)
 - The Chapter/Group treasurer must submit to the MUW Foundation a monthly report of itemized deposits and checks which identify the donors who have made contributions, along with the date and contribution designation. The recap of checks should include date, vendor, and purpose. The Office of Development & Alumni has provided a template to be used for this reporting (see Exhibit 3). If no activity occurs, then a report does not have to be submitted.
 - The MUW Foundation reconciles the bank account and then prepares and submits a quarterly financial statement to the Chapter/Group treasurer and MUWAA treasurer. Quarterly reports are submitted by October 31, January 31, April 30, and July 31.
 - Deposits made for scholarship contributions must be remitted to the Foundation by check monthly.
 - The MUW Foundation will prepare and send thank you letters and receive tax receipts for all contributions to the chapter bank account.
2. If the Chapter or Constituency Group chooses to maintain its funds within a designated fund at the MUW Foundation, all donations made directly to that fund through the University will be managed by the Foundation per its stated policies. However, if the group collects cash or check donations and/or dues directly from members, the following guidelines shall be followed.
- The Chapter/Group treasurer must submit to the MUW Foundation monthly an itemized report of funds received which identifies the donors name, amount given, date received, and contribution designation. All money received should be included with this report. The Office of Development & Alumni has provided a template to be used for this reporting (see Exhibit 3).

- The MUW Foundation will deposit these funds into the designated account upon receipt and will prepare and send thank you letters and tax receipts for all contributions to the respective donors.
 - All checks received should be made payable to the MUW Foundation.
 - If cash is collected, the cash must be delivered in person with the itemized report to the Office of Development and Alumni. If in person delivery is not possible, the cash should be deposited into a member's account and that member write a check to the MUW Foundation for the full amount of cash received. A detailed statement should accompany this check showing the breakdown of donors for the check. Cash should never be sent through the mail.
3. Chapter and Constituency Group funds are to be used for the sole benefit of the Chapter/Group or for the benefit of MUW. Bank accounts and Foundation Funds are maintained to meet Chapter/Group expenses and to provide support to MUW.
 4. Chapter and Constituency Groups may fundraise for the benefit of the Chapter/Group or the benefit of MUW. Fundraisers require review and approval of the Office of Development and Alumni. See Exhibit 4a for the Fundraiser form the Chapter/Group should submit for review, and Exhibit 4b for the informational / how-to guide regarding the entire fundraising process.
 5. Chapters and Constituency Groups must have a completed W-9 on file for any vendor that is an individual or partnership. The completed W-9 form should be mailed, not emailed, or faxed, to the Foundation office before the vendor is paid. For any vendor that a chapter/group pays \$600 or more in a calendar year, a 1099 form will be issued by the Foundation. Please visit <https://www.irs.gov/pub/irs-pdf/fw9.pdf> for the current W-9.
 6. Chapters and Constituency Groups may offer non-endowed scholarships to MUW students once per semester. Funding for this type of scholarship may be through Chapter/Group Funds supported by the Foundation or through the Chapter/Group's own account. However, all scholarship funds must be distributed through the University to the student's account.

II. PUBLIC STATEMENTS

- A. **News Releases and Comments to the Media:** Representatives of Chapters or Constituency Groups should restrict any news releases or comments to the media to information relative to Chapter or Constituency Group activities and events. Chapter and Constituency Group members are not authorized to

represent or speak for the MUW Alumni Association or the University. The Alumni Office must approve any press release the Chapter or Constituency Group wishes to publish. Please allow one week for approval.

III. ALUMNI CONTACT INFORMATION AND RELEASE POLICIES

- A. Alumni Database Information:** The database of records maintained by the Alumni Office, the Development Office, and the MUW Foundation represents confidential information about alumni and friends of MUW. In order to maintain privacy, the Alumni Office will not release any portion of those records except contact information for use in Chapter or Constituency Group programs planned with the Alumni Office according to the requirements outlined in these guidelines. Final authority in determining legitimate uses of the alumni records is given to the Director of Alumni Relations.
- B. Requests for Chapter Alumni Contact Information:** All Chapter or Constituency Group requests for alumni contact information will be made in writing or by phone to the Director of Alumni Relations.
- C. Confidentiality:** The confidentiality of the records must be maintained by the Chapter or Constituency Group in all cases and used for approved Chapter or Constituency Group events or meetings. No commercial or political use of alumni contact information is permitted. Use of contact information for any fundraising activity is prohibited unless it is for a Chapter or Constituency Group activity authorized in advance by the Office of Development and Alumni.

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VIII. CHAPTER/GROUP MEETING AND EVENT PLANNING

- A. Thoughtful and Innovative Planning:** Informative and enjoyable meetings and events are critical to a Chapter or Constituency Group's success. Consider the diverse audience, choose meeting places that are attractive to a wide variety of alumni, plan thoughtfully, formulate an agenda for the meeting, and make those who attend feel welcome. It is University policy to avoid discrimination in any way. Meetings should not be scheduled for any location, time, or day that exhibits a discriminatory effect on participation.
- B. Requesting Dates and Speakers:** When requesting approval for a meeting or event date from the Alumni Office, please do so for a minimum of eight weeks in advance. Please indicate the preferred University speaker(s) for the meeting or event. Every effort will be made to honor the request. All speaker requests must be made through the Office of Development and Alumni and not directly to the individual speaker.

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MUW Alumni Association Annual Chapter & Constituency Group Status Report

(Please complete this report and send to the Alumni Office by July 1)

Date: Month Day, Year

Name of Chapter: XYZ Chapter of MUWAA

President: First Name Last Name

Total Number of Active Members: 123

Group or Event Photo

Click Insert > Click Picture > Browse File > Select File > Click Insert

ADD GROUP OR EVENT PHOTO HERE

- Attach your Chapter or Constituency Group's list of officers and directors, if applicable, with their contact information
- List of exceptional things about the year
- List of areas of improvement for the upcoming year
- Explain how you publicize your events.

Chapter Reminders

- In addition to this Annual Status Report, an Event Report (Exhibit 2) should be completed after each gathering and submitted to the MUW Alumni Office.
- For additional Chapter & Constituency Group support, please reach out to the Alumni office. They will put you in contact with the Chapters & Constituency Groups Committee.

*Please contact the Office of Development & Alumni for an electronic copy of this template.

MUW Alumni Association Annual Chapter & Constituency Group Event Report

(Please complete this report and send to the Alumni Office following each event)

Date: Month Day, Year

Name of Chapter: XYZ Chapter of MUWAA

Contact: First Name Last Name

Contact's Email:

Event Location:

Event Chair:

Number of Participants:

- Alumni
- Students
- Friends
- Parents

MUW Representatives Present:

Preparation (phone calls, mailings, other publicity):

List exceptional things about the event:

List future improves for this event:

Mississippi University for Women Alumni Association Chapters and Constituency Groups – Fundraising Form and Procedures

Thank you for volunteering and fundraising for your Chapter or Constituency group in support of MUW. The University appreciates your continued efforts and monetary support! Below you will find the forms to complete and a “How To” on how to get your Chapter or Constituency

Group’s fundraiser approved, organized, and going.

After you review the attached Informational & How-to Guide, please fill out the following information in as much detail as possible. Please send this form along with your marketing plan / images to the Office of Development and Alumni for approval at **least two weeks prior** to your marketing start date.

Name of Chapter or Constituency Group:

Representative for Chapter or Constituency Group:

Representative Contact Email:

Dates of Proposed Fundraiser:

Design and Marketing

Description of Proposed Fundraiser Item:

Design of Proposed Fundraiser Item (please attach):

To whom will the Item be Marketed? (Select One):

- Inside Your Chapter or Constituency Group Only
- General MUW Public

If the Item is Targeted to Members of Your Chapter or Constituency Group Only and Has YOUR Chapter or Constituency Group Specific Logos ONLY meaning NO University / MUWAA intellectual property or other logos/intellectual property your individual group does not own - then University/MUWAA Approval Process of the logo is not necessary. Please check with the Office of Development and Alumni to understand what constitutes MUW and Other Intellectual Property.

If to the General MUW Public, please Identify Main Target Audience:

IMPORTANT: If the Item is Targeted Toward to a General MUW Public Audience or Desires the Use of W or Other Intellectual Property, please reference the Information Guide and follow all approval processes.

Pricing, Payment, and Information Catch:

Price of Proposed Fundraiser Item:

Will the Item be Distributed in Person or Shipped?:

If Shipped, Approximate Amount of Cost for Shipping:

Will Shipping be included in the Total Price?:

Who will ship this:

What company will be used?:

Manner of Accepting Payment for Proposed Fundraiser Item:

MUW Foundation Fund Fundraiser is Assigned To:

Alum Information Collection Process Developed: Yes / No (circle one)

Collected Alum Information Shared with Office of Development and Alumni

Date:

Name of Individual Sent to:

Mississippi University for Women Alumni Association Chapters and Constituency Groups – Informational & How-to Guide

Fundraising Approval:

Please send your fundraising idea and all designs to the Director of Alumni Relations and Donor Engagement. The Director of Alumni Relations and Donor Engagement will get it approved by the Executive Director of the MUW Foundation and MUW University Relations. If all is approved, the Chapter or Constituency Group contact will then be required to send proof of approval, and this completed form to the MUWAA President for final review.

Pricing, Payment, and Information Catch:

How do I Ship my items to the people who bought them?

Your Chapter or Constituency Group is responsible for shipping items. If you are shipping items, it is suggested that you take one example of your physical item packaged to your chosen mail service center and have it weighed for shipping. Use this cost and round it up by \$1 dollar to account for the price of item packaging. Provide this base cost in addition to the cost of the item to prospective buyers when you sell the item. It is recommended that one total cost (item cost + shipping) should be accepted from buyers when your item is sold.

When you are ready to ship out your items, keep all shipping receipts and turn them into your organization to receive reimbursement for out-of-pocket costs.

How to Accept Funds:

Most Recommended

Use of the MUW Foundation Website and a Foundation Fund. It creates an automatic collection of alum information for the MUWAA and MUW Foundation. It eliminates the need for fund transfers from personal or organization accounts to your MUW Foundation Fund.

Other Recommendations

Check, Cash (only with proper Information Collection), Paypal or Venmo

Not Recommended

Square or any service that charges a fee for use.

What is a Foundation Fund and How does it work?

For more information on Foundation Funds and they work please visit this link:
<https://longblueline.muw.edu/foundation>

Why do I use Foundation Funds?

Any donation to an MUW Foundation Fund is tax deductible and gives the donor automatic one year membership within the MUWAA.

Collecting Alum Information:

Why do I need to collect Alum information?

Up to date Alum information is incredibly important to your MUWAA Fundraising efforts as well as records alum / buyer information for your Chapter or Constituency Group, the MUWAA, and the University. It also enables the buyer/alum to be recorded as an active member of your Chapter or Constituency Group and the MUWAA.

How do I collect information?

It is recommended that buyer information is caught at the time of item purchase. This can be done through the MUW Foundation website or information request at time of purchase via purchase instructions. If you are not utilizing the MUW Foundation website, information should be organized into an excel sheet for the purpose of sharing with the University and for your Chapter or Constituency Group's records.

What Information do I need to collect?

At the very least please catch buyer individuals: Name, Email, and Physical Address . It is highly recommended to collect the buyer's: Name, Email, Physical Address, Class Year, and Phone Number.

Who do I send Collected Alum Information to at the University?

If not given via the MUW Foundation website, Alum Information should be sent to the Director of Alumni Relations and Donor Engagement at the University Office of Development and Alumni.