



**JMU ALUMNI  
ASSOCIATION**

**ALUMNI LEADER HANDBOOK**

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## Table of Contents

- 04 [JMU Alumni Association Information and Strategic Priorities](#)
- 06 [JMU Alumni Chapters and Regional Ambassadors: Definitions, Expectations and Resources](#)
- 20 [Liability Policies and Procedures](#)
- 22 [Alumni Communications/Branding](#)
- 24 [Events](#)
- 28 [Finances](#)
- 32 [Awards & Recognition](#)

# JMU Alumni Association Information and Strategic Priorities

## ABOUT THE JAMES MADISON UNIVERSITY ALUMNI ASSOCIATION

Founded in 1911 by the first graduating class, the JMU Alumni Association represents more than 140,000 living alumni of James Madison University around the world. The JMUA network of alumni chapters and regional ambassadors offers opportunities to stay connected to the university through a variety of events and services that are offered to all alumni.

## JMU ALUMNI ASSOCIATION MISSION STATEMENT

To engage alumni and cultivate involvement and investment in James Madison University.

## JMU ALUMNI ASSOCIATION VISION STATEMENT

To be the leading connector and primary resource for alumni engagement to the university-responsible for engaging a diverse alumni community that directly supports the university.

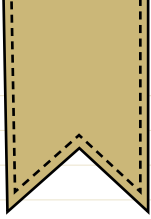
## JMU ALUMNI ASSOCIATION STRATEGIC PRIORITIES

- Engaging our Alumni
- Investing in our Students
- Strengthening our University
- Partnering for Success

## WHAT DO THE JMU ALUMNI ASSOCIATION STRATEGIC PRIORITIES MEAN TO ME AS AN ALUMNI VOLUNTEER?

- **ENGAGING OUR ALUMNI**  
Create and foster meaningful opportunities for alumni worldwide to serve James Madison University and to connect with the University, its students and other alumni.
- **INVESTING IN OUR STUDENTS**  
Foster Relationships with students that build a lifelong commitment to JMU and a positive identity as a JMU alumna/us.
- **STRENGTHENING OUR UNIVERSITY**  
Be ambassadors for our alma mater, inspiring investment in JMU.
- **PARTNERING FOR SUCCESS**  
Extend the reach, effectiveness, and efficiency of the JMU Alumni Association by building meaningful and lasting partnerships with University colleges, schools, departments, and organizations, as well as alumni-owned businesses.





# JMU Alumni Chapters and Regional Ambassadors: Definitions, Expectations and Resources

## WHAT IS AN ALUMNI CHAPTER?

JMU alumni chapters exist to connect alumni, promote James Madison University and the JMU Alumni Association around the world and to strengthen ties between alumni and their communities. Managing an alumni chapter is a big responsibility and requires the efforts of multiple board members working together in order to be truly successful.

Chapters come in two types: Blue Ridge chapters and Shenandoah chapters. Each chapter is free to select the level of involvement and responsibility that best suits their needs. Chapters with existing chapter scholarship funds are classified as Shenandoah Chapters and must adhere to the expectations outlined below.

To request forming a new chapter (either Blue Ridge or Shenandoah), we highly recommend that at least 100 JMU alumni live within a 50-mile radius of the region within which the chapter is officially based. This will ensure an active and engaged community. Additionally, individuals are always welcome to serve as Regional Ambassadors if they live in a region with fewer than 100 JMU alumni within a 50-mile radius.

## ALUMNI CHAPTER LEADERSHIP TEAM POSITIONS

Chapters rely on great volunteers. A successful chapter needs a base of chapter leaders it can rely on to stay active and engaged. Active volunteers in the chapter leadership keep the group current and energized, allowing for the work of running the chapter to be divided among the chapter leadership team. Volunteers are the lifeblood of the JMU Alumni Association – it wouldn't be possible without you!

Below are job descriptions for alumni chapter leaders. Blue Ridge and Shenandoah chapters are required to have a president, and Shenandoah chapters are required to have a vice president/president-elect. Chapter leaders absorb the responsibilities of other positions if serving on a smaller board.

### CHAPTER PRESIDENT

1. Provide overall leadership and direction to the alumni chapter
2. Must have served previously in another chapter leadership team role prior to applying for the role of chapter president
3. Establish annual chapter SMART goals in support of the mission of the JMU Alumni Association
4. Attend chapter events and activities
5. Preside over regularly scheduled chapter leadership meetings
6. Honor the Chapter Annual Operating Plan
7. Exercise overall financial responsibility for the chapter
8. Ensure all event revenues, expenses and invoices are submitted to the Office of Alumni Relations in compliance with JMU and Alumni Association policy
9. Attend, or designate another chapter leader to attend, the annual Madison Alumni Conference and report back to the chapter
10. Maintain regular contact with the Office of Alumni Relations
11. Submit a Chapter Annual Operating Plan and other required documents to the JMU Alumni Association by their designated deadlines
12. Ensure the position has a successor

### VICE-PRESIDENT/PRESIDENT-ELECT

1. Preside over meetings in the absence of the president
2. Must have served previously in another chapter leadership team role prior to applying for the role of chapter vice president
3. Coordinate programs and events with president and chapter leaders
4. Coordinate with the chapter president to advise all chapter leaders in the completion of tasks and responsibilities
5. Serve as interim president, if necessary, during a presidential transition

#### COMMUNICATIONS AND MARKETING CHAIR

1. Coordinate chapter communications with chapter leaders
2. Maintain board meeting minutes and distribute to chapter leaders
3. Utilize social media to promote the chapter and chapter events, share images and engage alumni online
4. Connect with new attendees at events to add them to chapter Listserv
5. Recommend to new alumni to update their contact information with the JMU Alumni Association
6. Support chapter president and vice president with Listserv communication
7. Coordinate event communication with other chapter leaders
8. Build membership through direct emails on the chapter listserv



#### PHILANTHROPY CHAIR

1. Organize and encourage service opportunities for the chapter
2. Create list of planned service events for the year
3. Create opportunities to raise awareness of JMU service, including local scholarships if applicable
4. ALL Chapter Leadership Team members as alumni leaders are highly encouraged to personally participate in annual philanthropic support of JMU, at any level of monetary giving, particularly through Giving Day and also promoting Giving Day to alumni in your region
5. Partner with the Office of Alumni Relations to communicate priority funds and giving options to the Chapter Leadership Team throughout the fiscal year as well as up-to-date information regarding giving, i.e. fundraising guidelines per the JMUA and JMU/JMU Foundation
6. Partner with the Office of Alumni Relations to facilitate inclusion of JMU giving messages in all electronic communications (email/social media) and event registrations as appropriate
7. Keep Chapter Leadership Team and chapter members informed of relevant giving information as it relates to alumni giving participation at JMU
8. Ensure the chapter has tools and knowledge necessary to include a giving component at all programs/events
9. Encourage, motivate, and seek out potential chapter members to actively give to JMU

#### SPECIAL EVENTS CHAIR

1. Create social opportunities for chapter
2. Plan and coordinate events; serve as event lead and assign roles per event to the other chapter leaders
3. Ensure all risk management and university policies are followed at alumni events
4. Partner with the Office of Alumni Relations Assistant Director of Alumni Engagement to develop pre-event budgets and post-event financial wrap ups
5. Ensure all event revenues, expenses and invoices are submitted to the chapter president in compliance with JMU and JMU Alumni Association policy
6. Work with vendors and venues for event details
7. Handle event logistics
8. Partner with the Chair of Communications & Marketing and other chapter leaders to advertise and market events.



### WHAT IS A REGIONAL AMBASSADOR?

Regional ambassadors are alumni leaders who live in a region with fewer than 100 JMU alumni within a 50-mile radius, and serve to represent JMU and coordinate alumni events in their region in lieu of an official chapter presence with a full leadership team. Typically, one regional ambassador solely serves as the alumni leader for their region, although there may be more than one regional ambassador for an alumni region if a duo or team format is preferred.

#### REGIONAL AMBASSADOR POSITION

1. Build relationships with alumni, current and prospective students and friends of the University in areas that may not have enough alumni to support forming a regional alumni chapter.
2. Serve as a liaison between the university and your region.
3. Permit JMU and JMUAAs to share your name and contact information with other JMU alumni who may be moving to your geographical region.
4. Create and monitor an email account specifically for the purpose of connecting with other alumni and share the login information with the Office of Alumni Relations for historical record.
5. Assist the JMUAAs with coordination of local marketing for any official JMU events that may occur within regional ambassador's region.
6. Participate in conference calls, webinars and other training opportunities to receive JMU and alumni updates.
7. Annual philanthropic support of JMU, particularly through personal participation in Giving Day and promoting Giving Day to alumni in your region, is highly encouraged.
8. Create, monitor and maintain social media platforms that engage alumni in your region and share the login information with the Office of Alumni Relations for historical record.

## JMU ALUMNI LEADER EXPECTATIONS

### TRAINING AND ONBOARDING

Prior to starting in your role as a JMUAAs Alumni Leader, you can expect to experience the following:

1. Meet with the Office of Alumni Relations to talk through the role, expectations and best practices - most often this meeting occurs via telephone or a Zoom video conference call.
2. Read through this document and other resources.
3. Sign the Volunteer Agreement/Confidentiality Statement.
4. If possible, speak with the person who held the role before you.
5. If becoming a Chapter Leader, speak with others on the current Chapter Leadership Team to get a better sense of what they expect of you and your position. Review the Chapter's Annual Operating Plan for the current fiscal year.
6. Plan to attend the annual Madison Alumni Conference, typically scheduled in late May or early June, for training and development opportunities, as well as the opportunity to network with other JMU alumni leaders and chapter leadership teams.



**ANNUAL EXPECTATIONS:**

**VOLUNTEER OPERATIONS AND STAFF SUPPORT FROM THE JMUA**

	REGIONAL AMBASSADORS	BLUE RIDGE CHAPTERS	SHENANDOAH CHAPTERS
LEADERSHIP TEAM	Typically consists of one regional ambassador solely serving as the alumni leader for their region, although there may be more than one regional ambassador for an alumni region if a duo or team format is preferred.  Regional ambassadors are invited to attend the annual Madison Alumni Conference.	Must have a president.  Chapter leaders are invited to attend the annual Madison Alumni Conference.	Must have a president and a vice president/president-elect. Presidents are term limited to 2 years and are encouraged to continue their service as a Board Advisor.  Recommended to not exceed a board of 10 members.  At least one board member must attend the annual MAC
MAINTAIN ACTIVE STATUS	All regional ambassadors must sign the Alumni Leader Operating Agreement outlining the expectations of alumni leaders, regional operations and alumni leader conduct annually.	Chapter president must submit the Chapter Annual Operating Plan each year.  All Chapter Leadership Team members must sign the Chapter Operating Agreement outlining the expectations of chapter leaders, chapter operations and chapter conduct annually.	Chapter president must submit the Chapter Annual Operating Plan each year.  All Chapter Leadership Team members must sign the Chapter Operating Agreement outlining the expectations of chapter leaders, chapter operations and chapter conduct annually.
EVENTS	Regional ambassadors are encouraged to coordinate/host one event per quarter, totaling 4 events per fiscal year. While encouraged, this frequency of events is not required of regional ambassadors.	Must host one event per quarter, totaling 4 events per fiscal year.  Chapters must participate in JMU Giving Day. Coordination of and participation in a day of service is encouraged.	Must host at least 2 events per quarter, totaling at least 8 events per fiscal year.  Chapters must participate in JMU Giving Day. Coordination of and participation in a day of service is encouraged.
SOCIAL MEDIA	Must consistently maintain a regional alumni Facebook or Instagram page, complete with info to contact you as the regional ambassador.	Must consistently maintain a chapter Facebook or Instagram page, complete with chapter info.	Must consistently maintain a chapter Facebook or Instagram page, complete with chapter info.

	REGIONAL AMBASSADORS	BLUE RIDGE CHAPTERS	SHENANDOAH CHAPTERS
PHILANTHROPY	Encouraged to participate in JMU Giving Day.	Must participate in JMU Giving Day.	Must participate in JMU Giving Day.  Chapters must commit to increase alumni philanthropic participation to the best of their ability. If the chapter offers a scholarship, the chapter must commit to raise funds for that scholarship.
EVENT SUPPORT	Receive swag for events and activities from the JMU Office of Alumni Relations as appropriate.  JMUA creates registration pages and maintains a central calendar of regional alumni events.	Receive JMUA staff support for events and activities as appropriate.  Receive swag for chapter events from the JMU Office of Alumni Relations as appropriate.  JMUA creates registration pages, maintains a central calendar of chapter events, and sends scheduled monthly emails to promote chapter events.	Receive JMUA staff support for events and activities as appropriate.  Receive swag for chapter events from the JMU Office of Alumni Relations as appropriate.  JMUA creates registration pages, maintains a central calendar of chapter events, and sends scheduled monthly emails to promote chapter events.



	REGIONAL AMBASSADORS	BLUE RIDGE CHAPTERS	SHENANDOAH CHAPTERS
FISCAL MANAGEMENT SUPPORT	<p>Please contact the Office of Alumni Relations.</p>	<p>Chapters are responsible for tracking and reporting all chapter expenses associated with chapter programming and events.</p> <p>JMUAA is responsible for all fiscal oversight and management for the chapter accounts, including but not limited to, prior written approval of any expense that exceeds \$250.</p> <p>Chapters may not collect dues or donations without prior consent from the JMUAA.</p> <p>Chapters may not open bank accounts in the name of the group nor hold group funds within a personal account.</p>	<p>Chapters are responsible for tracking and reporting all chapter expenses associated with chapter programming and events.</p> <p>JMUAA is responsible for all fiscal oversight and management for the chapter accounts, including but not limited to, prior written approval of any expense that exceeds \$250.</p> <p>Chapters may not collect dues or donations without prior consent from the JMUAA.</p> <p>Chapters may not open bank accounts in the name of the group nor hold group funds within a personal account.</p>



	REGIONAL AMBASSADORS	BLUE RIDGE CHAPTERS	SHENANDOAH CHAPTERS
COMMUNICATIONS	<p>Receive a regional logo.</p> <p>Receive consistent updates, pertinent info and training opportunities and resources for alumni leaders from the Office of Alumni Relations via email to the Alumni Leaders Listserv, Alumni Leaders Facebook Group.</p> <p>Regional ambassadors must consistently maintain and update an alumni Listserv for email communication with their alumni base.</p>	<p>Receive a chapter logo.</p> <p>Receive consistent updates, pertinent info and training opportunities and resources for alumni leaders from the Office of Alumni Relations via email to the Alumni Leaders Listserv, Alumni Leaders Facebook Group.</p> <p>Chapters must consistently maintain and update a chapter Listserv for email communication with their alumni base.</p>	<p>Receive a chapter logo.</p> <p>Receive consistent updates, pertinent info and training opportunities and resources for alumni leaders from the Office of Alumni Relations via email to the Alumni Leaders Listserv, Alumni Leaders Facebook Group.</p> <p>Chapters must consistently maintain and update a chapter Listserv for email communication with their alumni base.</p>
AWARDS	<p>Eligible to receive awards from the JMUAA, presented annually at the Madison Alumni Conference.</p>	<p>Eligible to receive awards from the JMUAA, presented annually at the Madison Alumni Conference.</p>	<p>Eligible to receive awards from the JMUAA, presented annually at the Madison Alumni Conference.</p>



## JMU ALUMNI CHAPTER ANNUAL GOALS

The work of JMU alumni chapter leadership teams to connect and engage alumni is vital to the success of the JMU Alumni Association in helping to fulfill its 4 strategic priorities every year. Chapters are required to outline annual goals within their Chapter Annual Operating Plans submitted annually to the Office of Alumni Relations.

While goals may differ between chapters, it is recommended that SMART (Specific, Measurable, Achievable, Realistic and Time Bound) goals be submitted. Chapter goals may be accomplished through chapter events, programming, social media presence/outreach to regional alumni, etc. for reference during chapter evaluation at the end of each fiscal year, as well as for consideration during chapter nominations for annual awards from the JMUA. Please visit the Alumni Leader Resources webpage to reference a sample Chapter Annual Operating Plan with outlined SMART goals.



## LEADERSHIP TRANSITION

When it is time to transition leadership, there are a series of steps that should be taken. Following these procedures will ensure that chapter engagement remains consistent and chapter members have the best experience possible.

### CHAPTER PRESIDENT

1. Alert the Office of Alumni Relations as soon as possible to begin coordination of a timeline and transition plan.
2. Alert the Chapter Leadership Team and begin to recruit applicants to serve as successor.
3. The outgoing chapter president should construct an update to alert the Chapter Leadership Team that he/she will step down and to ask for those interested in the position to send an email to him/her. The chapter president, vice president and the Office of Alumni Relations should collectively review applicants and select a new candidate.
4. If the outgoing chapter president is unable to find a successor among the current Chapter Leadership Team, he/she should train the vice president to serve as interim, and the Chapter Leadership Team should continue seeking a replacement through a formal application process. In this case, it is helpful to host a chapter leadership interest meeting for local alumni, and partner with the Office of Alumni Relations to send an email to alumni in the chapter's regional area encouraging them to attend to learn more about becoming a chapter leader and formally apply via online application.
5. Once a new chapter president is selected, post a chapter president profile on social media pages, plan a leadership team meeting and alert the Office of Alumni Relations of the change for historical record.
6. If possible, the outgoing and incoming president should meet to discuss chapter business, upcoming events and long-term plans.

### OTHER CHAPTER LEADERSHIP/REGIONAL AMBASSADOR

At all chapter events, be sure to note highly engaged and involved alumni. If a chapter leader or regional ambassador must step down, try reaching out to these alumni individually to seek a replacement. A Chapter Leader/Regional Ambassador interest meeting is helpful in recruiting a new Chapter Leadership Team as well, and can occur as a formal in-person meeting or virtually. If these steps do not garner interest, announcing opening positions via social media and email can create interest in the position from your chapter membership or regional alumni. Please reach out to the Office of Alumni Relations for support during a transition in leadership, and remember to alert the staff of any changes for historical record.

## ALUMNI LEADER RESOURCES

### JMU ALUMNI LEADER RESOURCES WEB PAGE

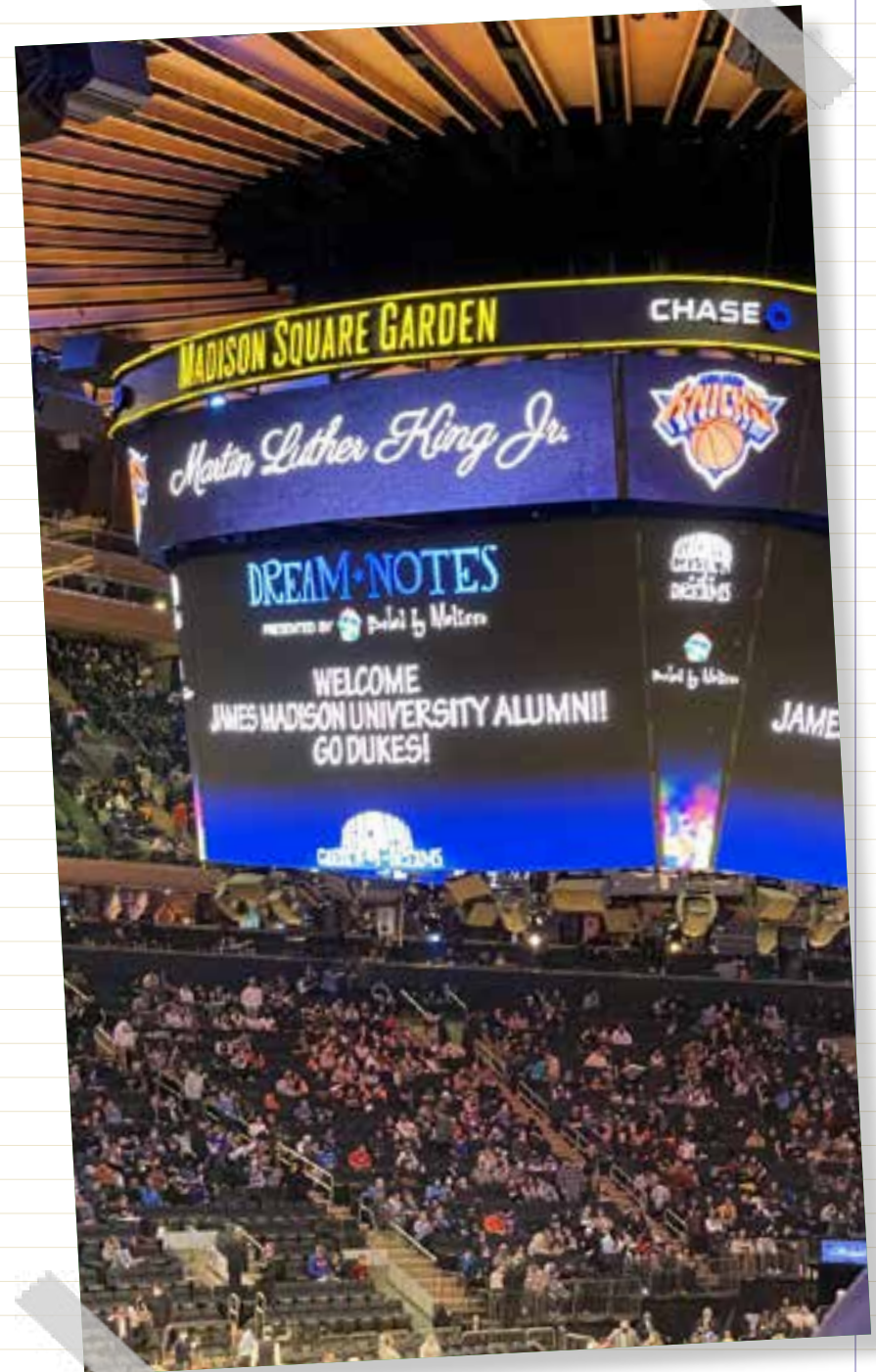
The Alumni Leader Resources web page has additional information and helpful forms that will be useful to you as an alumni leader. These resources include examples, templates and best practices for all aspects of fulfilling your role as a regional ambassador or chapter leader and chapter operations. Be sure to check this page for updates periodically. Found online at [alumni.jmu.edu/leaderresources](http://alumni.jmu.edu/leaderresources)

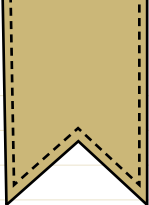
### JMU ALUMNI LEADERS FACEBOOK GROUP

This Facebook group is a great networking tool for alumni leaders around the world. Chapter leaders use this space to share updates, pictures and ideas that have been successful with their chapters and network with each other. If you have difficulty accessing this group, please email the Office of Alumni Relations for assistance. The Facebook Group is online at [facebook.com/groups/JMUChapterLeaders](https://facebook.com/groups/JMUChapterLeaders)

### JMU ALUMNI LEADER LISTSERV

The Alumni Leader listserv is an email tool maintained by the Office of Alumni Relations to communicate pertinent updates and information to all alumni leaders at once in addition to posting in the Facebook group. Please notify this staff member of any changes to your preferred email address or chapter leadership team changes to ensure up to date information for communicating with alumni leaders.





## Liability Policies and Procedures

### CONTRACTS

All external contracts and invoices need to reflect JMU Staff contact information as the client (in most cases, the Office of Alumni Relations) and should **only be approved and signed** by the Director of Alumni Relations. Please make sure all contracts do not have chapter leader names or contact information, except in the instance of being listed as a secondary contact specifically for communication regarding planning and executing the chapter event or program for which the contract is outlined. **If you as an alumni leader sign a contract, you could be personally responsible for associated expenses.** Note that alumni leaders are not permitted to front event costs, contracts or invoices of any kind to submit for reimbursement later. Please visit the **Finances** section for more details on reimbursement policies.

Therefore, it is of utmost importance that you send all contracts to the JMU Alumni Association to be thoroughly reviewed, approved and signed. This process prevents chapter leaders from becoming personally liable for the contract. Please submit all contracts to the Office of Alumni Relations 14-21 business days prior to the desired date for the contract to be signed.

Please allow at least 5 additional business days for a required deposit to be submitted by the desired payment date following approval and signing of an associated contract.

### DOOR PRIZES/RAFFLES

Chapters can choose to raffle door prizes at chapter events. The JMU Alumni Association will act as a liaison between other schools, colleges, departments and units for prizes when appropriate. Please reference the **Money** subsection within the **Finances** section regarding cash collection and policy for prior approval from the Office of Alumni Relations.

### ALCOHOL POLICY

All chapter events must follow the official JMU alcohol policy. Important tips to remember:

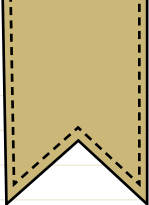
- Do not serve alcohol to any individual under 21 years of age.
- Ensure food and non-alcoholic beverages are available to event attendees.
- For event-specific alcohol-related questions, please contact the Office of Alumni Relations.

### SPONSORSHIPS

Chapters can have local businesses, companies and/or individuals help offset costs for a chapter event. Local companies may want to provide door prizes, event supplies, services or a monetary gift. Sponsorships are great ways to further fund chapter events and programming! Chapter event sponsors can be recognized on event marketing materials, as part of the event program, and/or on social media pages as examples for terms of a sponsorship contract. Please contact the Office of Alumni Relations for more information about sponsorships and drafting sponsorship contracts for approval. Please note that the same approval requirements and timeline apply for sponsorship contracts as outlined in the **Contracts** subsection above.

In addition to obtaining approval and signing from the Office of Alumni Relations for a sponsorship contract, please note the following distinctions based on the type of sponsorship:

- **MONETARY SPONSORSHIPS:** Individuals or businesses that would like to sponsor a chapter should mail a check payable to the JMU Alumni Association directly to the JMU Alumni Office, and JMU Alumni Association staff will ensure the funds are used toward the chapter event. We strongly recommend sponsoring chapter events and programming through monetary sponsorships when possible.
- **SERVICE OR SUPPLY SPONSORSHIPS:** Individuals or vendors may wish to contribute services such as catering, music, floral arrangements, etc., event supplies, or door prizes for a chapter event or program. In addition to the sponsorship contract, they can be recognized post-event/program with a letter of acknowledgement for the services rendered.



# Communications and Branding

## CHAPTER/REGIONAL AMBASSADOR DIRECTORY

All alumni chapters and regional ambassadors are listed in a directory on the JMU Alumni Association website. This directory features chapter and regional ambassador contact information (this refers to the chapter email) and social media links. To have information updated, please contact the Office of Alumni Relations.

## MONTHLY CHAPTER EMAILS

On behalf of each chapter, the Office of Alumni Relations will send up to one email per month. The email is a digest structure and will include all the chapter's upcoming events. The Event Request form must be submitted at least 5 business days in advance of the chapter's assigned Tuesday to ensure an upcoming event is included in the monthly email. Discretion is left to the JMU Alumni Association to not send a chapter email if there is not substantial content to justify sending one.

## JMU ALUMNI LISTSERVS

A listserv is an email tool that allows alumni leaders to efficiently send an email to many people. All alumni leaders have access to a JMU Alumni Listserv that can be used to communicate directly with alumni in their area who opt-in to receive JMU

email communications. Use and maintenance of the listserv is at the discretion of alumni leaders. Please reference the JMU Alumni Listserv Guide on the Alumni Leader Resources webpage for additional information and best practices.

## SOCIAL MEDIA

Alumni leaders must consistently maintain an active Facebook page/group or Instagram account that is active monthly at a minimum. Alumni leaders are permitted to have any/all social media they would like for their chapter/region, including Instagram, LinkedIn, Twitter, etc. Please add the Office of Alumni Relations as an administrator for all social media accounts and share log-in information for internal record and quality assurance.

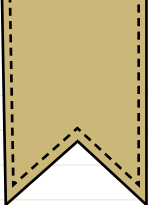
## CHAPTER/REGIONAL LOGOS AND DESIGN

Alumni leaders will receive a logo that can be used for social media, chapter emails, alumni listservs, etc. All designs must follow the JMU brand guidelines for trademarks, logos and merchandise.

No alterations of the university marks or logos are allowed. Alumni leaders must have explicit permission from the JMU Alumni Association for authorization to use a mark, logo or verbiage on any printed merchandise. Alumni leaders cannot print merchandise until official approval is granted by the JMUA. The JMU Alumni Association team will work directly with vendors to print all merchandise.

Please contact the Office of Alumni Relations to initiate JMUA approval for printed merchandise.





## Events

Alumni leaders are encouraged to plan diverse events that engage alumni with varied interests. Some alumni are interested in attending a sporting event, while others are more interested in networking. Providing a wide range of activities for alumni in your area gets more people involved, and creativity in programming keeps alumni involvement fun and exciting for attendees.

Regional ambassadors are encouraged to coordinate/host one event per quarter, totaling 4 events per fiscal year. While encouraged, this frequency of events is not required of regional ambassadors.

Blue Ridge chapters are required to host at least 1 event per quarter, totaling at least 4 events per fiscal year – each event aligning with one of the JMUAAs Strategic Priorities (outlined in the first section of this Handbook), which overlap with the 7 following event categories as well. Shenandoah chapters are required to host at least 2 events per quarter, totaling at least 8 events per fiscal year in at least 4 of the following 7 event categories, aligning with the JMUAAs Strategic Priorities as well, which are outlined in the first section of this Handbook.

All chapters are expected to participate in Giving Day, the university’s annual crowdfunding day for alumni, students, and faculty/staff. A mix of social media engagement and in-person events like happy hours, networking, or group activities is the key to Giving Day success.

## EVENT CATEGORIES

**ALUMNI CONNECT:** An event that allows alumni to connect and engage with one another in a social setting. *(potentially aligns with the JMUAAs Strategic Priority Engaging our Alumni and Partnering for Success)*

**ACADEMIC INTEREST:** An event that promotes academic engagement and lifelong learning. *(potentially aligns with the JMUAAs Strategic Priority Engaging our Alumni, Investing in our Students, and/or Partnering for Success)*

**MADISON NETWORK:** Events that seek to connect alumni based on professional growth and development. *(potentially aligns with the JMUAAs Strategic Priority Engaging our Alumni and/or Partnering for Success)*

**STUDENT-FOCUSED:** An event which local alumni connect with or support JMU students, either in the chapter’s community or on campus. *(potentially aligns with the JMUAAs Strategic Priority Investing in our Students and/or Strengthening our University)*

**SERVICE:** An event that invites alumni and friends to serve and engage with the community. *(potentially aligns with the JMUAAs Strategic Priority Engaging our Alumni, Investing in our Students, Strengthening our University and/or Partnering for Success)*

**DONORSHIP:** Any event with a fundraising component for a JMU Alumni Association Alumni Chapter, an Alumni Chapter scholarship fund, or in partnership with JMU’s Office of Annual Giving. *(potentially aligns with the JMUAAs Strategic Priority Engaging our Alumni, Investing in our Students, Strengthening our University and/or Partnering for Success)*

**AFFINITY:** An event that caters to any group of people linked by a common interest, purpose, or identity. All chapters are encouraged to partner with our affinity chapters to offer alumni affinity programming in diverse geographic areas. *(potentially aligns with the JMUAAs Strategic Priority Engaging our Alumni, Investing in our Students, Strengthening our University and/or Partnering for Success)*

## EVENT REQUEST FORM

Alumni Leaders must submit an Event Request Form for all events (please visit the Alumni Leader Resources webpage to access the Event Request Form). The form must be submitted at least 4 weeks prior to the event to allow at least 5 business days for the Office of Alumni Relations staff to process the event request and create an event registration page, and allow at least 3 weeks for the alumni leader to successfully promote the event and acquire registrations.

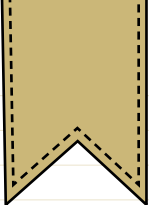
Events with a vendor, speaker, or ticketing component must be submitted at least 6 weeks prior to the event.

Alumni Leaders may use Facebook to promote upcoming events with official registration webpages through the JMCAA, but are **not permitted** to use Facebook Events to collect registration information.

Please contact the Office of Alumni Relations with questions.

For additional information about event planning, including a recommended event planning timeline and event best practices, please visit the Alumni Leader Resources webpage.





## Finances

### ALUMNI LEADER MONEY HANDLING POLICIES & CHAPTER ACCOUNTS

1. Alumni leaders are not permitted to hold private banking accounts for use with regional/chapter programming and/or operations.
2. Prior approval from the JMU Office of Alumni Relations is required for any expense that exceeds \$250.00. Contact the Office of Alumni Relations to request approval for an expense exceeding \$250.00. Please note that a minimum notice of at least 5 business days should be given to staff prior to the preferred date for purchase and/or payment.
3. Per the JMUAAs annual audit policies and procedures, cash or checks collected must be submitted either in person or via mail to the JMUAAs immediately, and within no more than 48 hours total if an event occurs over a weekend. Cash collected may be converted to a cashier's check payable to the JMUAAs. Please contact the Office of Alumni Relations for additional information regarding submitting monies to the JMUAAs.
4. Alumni leaders for regions with designated alumni chapter accounts through the JMU Alumni Association must maintain positive chapter account standing with a balance no less than \$0.00 at any given period throughout the fiscal year. Chapters are provided an account

balance update at the beginning of every fiscal year during the month of July, along with quarterly updates on their account balance throughout the fiscal year.

5. Alumni leaders are required to track all chapter expenses and revenue through use of financial wrap up templates provided by the JMUAAs. Alumni leaders are required to submit financial wrap ups to the Office of Alumni Relations within 5 business days following the event or program for which the financial wrap up is associated. Alumni leaders are expected to keep record of submitted financial wrap ups for future reference and in potential cases for cross-checking with the internal records maintained by the JMUAAs. Financial wrap up templates are located on the Alumni Leader Resources webpage. Please contact the Office of Alumni Relations for additional information.
6. Fundraising:
  - **FUNDRAISING EVENTS:** Chapters with endowed scholarships may host fundraising events to raise additional scholarship funds. Examples include the Richmond and DC Crabfest events, among others. Any chapter planning to host a fundraising event of this sort must speak with the Office of Alumni Relations before initiating event planning.
  - **OPTION TO DONATE AT REGISTRATION:** Add a donation option to event registrations to promote giving to the chapter or to a chapter scholarship fund in conjunction with event attendance. This request must be made on the Event Request Form.
  - **PARTIAL DONATION WITH REGISTRATION FEES:** Charge registration for an event, and have a portion of the revenue received be donated as a gift to the university from the alumni chapter, and the remaining portion cover event expenses. This request must be made on the Event Request Form.
  - **PROCEEDS EVENTS:** Chapters may partner with local businesses for proceeds night events. Event organizers must contact the Office of Alumni Relations to discuss proper financial procedures.
  - **CHAPTER OPERATING FUND DONATION LINK:** This form can be shared with alumni to encourage online non-tax deductible donations to your chapter's operating fund.

## CASH COLLECTION POLICY & PROCEDURE

Sometimes it is necessary to collect cash at events. Alumni leaders may accept cash on behalf of the JMUA A with prior approval. It is very important that alumni leaders are vigilant about cash collections, and work to ensure that all monies collected are accounted for and returned to the JMUA A immediately. The procedure for handling cash at chapter and regional alumni events is as follows:

- Maintain dual control. Two people must be assigned wherever cash is collected at all times, and it is required that the same two people remain assigned to this task through the entirety of the event to reduce risk of mistakes or mishandling.
- Using the **Receipt Log** template provided on the Alumni Leader Resources webpage, the two people handling cash collection must also complete a receipt log for all payments received. This record includes who paid, the amount and payment method.
- At the end of the event, both people involved in cash handling must count cash and checks collected. Checks should be written to the JMU Alumni Association, NOT to the chapter or an alumni leader. After collections are counted twice and the total amount confirmed, monies must be placed in an envelope along with the completed receipt log. The envelope must be sealed, the total amount enclosed should be written on the outside of the envelope, and both people who counted the money should sign the envelope over the back seal.
- Cash collected can be returned in person to the JMUA A immediately OR converted to a cashier's check payable to the JMU Alumni Association and mailed.
- Please be aware that alumni leaders cannot use cash collected at an event to pay any expenses or reimbursements. All payment and/or reimbursement requests must be submitted to the Office of Alumni Relations along with itemized receipts for payment by the JMUA A.

Please contact the Office of Alumni Relations for further information regarding cash collection policies and procedures.

## REIMBURSEMENT AND VENDOR PAYMENT POLICY & PROCEDURE

While our office strives to reimburse in a timely process, please note that reimbursements may take 15 to 20 business days to process. To be reimbursed for a chapter/regional alumni programming-related expense, alumni leaders must submit the Volunteer Reimbursement Request (located on the Alumni Leader Resources webpage) along with an itemized receipt. A description indicating how/why the funds were used is required on the Reimbursement form.

Please note that alumni leaders are not permitted to front event costs, contracts or invoices of any kind which are associated with an event venue or vendor to submit

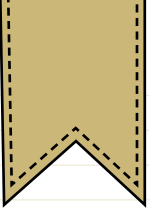


for reimbursement later. If you have an event and a vendor needs to be paid, the vendor must submit an invoice to the JMUA A for payment from the JMUA A.

In certain instances, it may be possible for vendors to be paid over the phone by credit card rather than mailing a check. If an alumni leader prefers to utilize the credit card payment option, contact the Office of Alumni Relations Programming to schedule payment arrangements.

Examples of expenses which are permitted for alumni leaders to front the cost and submit for reimbursement include but are not limited to: day-of event expenses (eg. balloon order, purchasing additional materials such as table cloths, cutlery, etc.), chapter leadership team meeting expenses (eg. ordering pizza and/or non-alcoholic beverages). For further guidance on types of expenses which are or are not permitted for alumni leaders to front costs and submit for reimbursement, please contact the Office of Alumni Relations.





## Awards and Recognition

Chapter leaders and regional ambassadors can be recognized for their accomplishments and efforts to support the JMU community each year. Chapters may nominate their own chapter and chapter leaders for any or all chapter awards offered; regional ambassadors may nominate themselves for any or all applicable awards offered as well.

Please note that chapters, individual chapter leaders and regional ambassadors are eligible to win **no more than 1 award per fiscal year**, even if nominated for multiple awards. Award recipients will be notified ahead of the official award ceremony, where they will be formally recognized among alumni leader peers in attendance and receive a memento to commemorate their achievement and honor their service to the JMU Alumni Association. Nomination forms and deadlines are emailed to chapter leaders regional ambassadors each year. Please visit the Alumni Leader Resources webpage to reference a sample award nomination submission.

### SHENANDOAH CHAPTER OF THE YEAR - REGIONAL

This award is presented to one regional based Shenandoah Chapter (Oversees an endowed chapter scholarship) who has fulfilled their annual expectations as outlined in the expectations chart and exceeded their goals outlined in their annual operating plan for the current fiscal year, having gone above and beyond to exhibit strong leadership, effectual volunteer structure and hosting events/programs that reach a diverse group of alumni to positively represent James Madison University.

### BLUE RIDGE CHAPTER OF THE YEAR - REGIONAL

This award is presented to one regional based Blue Ridge Chapter (Does NOT oversee an endowed chapter scholarship) who has fulfilled their annual expectations as outlined in the expectations chart and exceeded their goals outlined in their annual operating plan for the current fiscal year, having gone above and beyond to exhibit strong leadership, effectual volunteer structure and hosting events/programs that reach a diverse group of alumni to positively represent James Madison University.

### AFFINITY CHAPTER OF THE YEAR

This award is presented to the affinity based chapter (Shenandoah or Blue Ridge) who has fulfilled their annual expectations as outlined in the expectations chart and exceeded their goals outlined in their annual operating plan for the current fiscal year, having gone above and beyond to exhibit strong leadership, effectual volunteer structure and hosting events/programs that reach a diverse group of alumni to positively represent James Madison University.



### REGIONAL AMBASSADOR OF THE YEAR

This award is presented to a Regional Ambassador (represents a geographic area with a smaller population of Alumni) who has fulfilled and exceeded all expectations and guidelines as an alumni leader, and continuously promotes JMU's ideas and values. This individual has displayed exceptional and extended service to their alumni group and the university, and lives with the spirit of giving back and bleeding purple.

### CHAPTER LEADER OF THE YEAR

This award is presented to a Chapter Leader (Regional or Affinity based) who has fulfilled and exceeded all expectations and guidelines as an alumni leader, and continuously promotes JMU's ideas and values. This individual has displayed exceptional and extended service to their alumni group and the university, and lives with the spirit of giving back and bleeding purple.

### CHAPTER/REGIONAL AMBASSADOR ON THE RISE

This award is presented to a new or previously existing Chapter or Regional Ambassador that has taken great strides to elevate the culture of alumni engagement and JMU pride within their community over the past year.

### LEELOU LIFETIME SERVICE AWARD (new in 2022)

This prestigious award is presented to one current or former Chapter Leader or Regional Ambassador who has committed their post-graduate experience towards furthering the mission of the JMU Alumni Association. Awardees of this honor have cultivated a culture of active citizenry, philanthropy, and community engagement in their roles as Alumni Volunteers. Annual recipients of the Leeolou Lifetime Service Award will be enshrined on a plaque that will live on display in the Leeolou Alumni Center at JMU.

