To our valued alumni club and society leaders:

The staff members at The Ohio State University Alumni Association are extremely proud and grateful to work with over 2,400 alumni group leaders to engage Buckeye Nation in Ohio and around the world. With a growing population of over 550,000 alumni it is more important than ever that Buckeyes everywhere stay involved and connected to Ohio State. We strongly believe that when alumni join your group, attend one of your events or donate to your scholarship fund, they truly embrace Woody Hayes’ “pay forward” philosophy.

Our hope is that this handbook will serve as a comprehensive resource to help you engage your Buckeye community, and access the support and services we provide. We are always here to answer any questions, listen to your feedback and connect you to best practices.

On behalf of the regional engagement team and the alumni association, I thank each of you for all that you do to empower, engage, evolve and enrich the lives of Buckeyes everywhere. Great work!

HOW FIRM THY FRIENDSHIP,

Donald A. Stenta, PhD ’01
Assistant Vice President, Alumni Experiences
The Ohio State University Alumni Association
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Board of Governors Roles and Responsibilities</td>
<td>4</td>
</tr>
<tr>
<td>How To: Recruit Alumni Group Volunteers</td>
<td>6</td>
</tr>
<tr>
<td>Alumni Club and Society Incentive Grids</td>
<td>10</td>
</tr>
<tr>
<td>Communications Support and Best Practices</td>
<td>14</td>
</tr>
<tr>
<td>How To: Events</td>
<td>16</td>
</tr>
<tr>
<td>Event Checklist</td>
<td>18</td>
</tr>
<tr>
<td>How To: DocuSign</td>
<td>20</td>
</tr>
<tr>
<td>Game Day Best Practices</td>
<td>23</td>
</tr>
<tr>
<td>Speakers List</td>
<td>24</td>
</tr>
<tr>
<td>Membership</td>
<td>26</td>
</tr>
<tr>
<td>How To: Provide Scholarships</td>
<td>27</td>
</tr>
<tr>
<td>How To: Fundraise</td>
<td>27</td>
</tr>
<tr>
<td>Finance</td>
<td>29</td>
</tr>
<tr>
<td>Awards and Recognition</td>
<td>30</td>
</tr>
<tr>
<td>Notes and Contacts</td>
<td>31</td>
</tr>
</tbody>
</table>
BOARD OF GOVERNORS
ROLES AND RESPONSIBILITIES

PRESIDENT
• Supervises all alumni group affairs
• Establishes short- and long-term goals
• Organizes and runs board meetings
• Serves as liaison to the alumni association
• Keeps alumni group on track to meet goals
• Recognizes the efforts of fellow board members and holds them accountable for duties

VICE PRESIDENT / PRESIDENT ELECT
• Performs duties of the president in their absence
• Follows up with board officers on tasks, deadlines and goals
• Helps president develop succession plan for leadership
• Fills in when needed for board of governors responsibilities (e.g., if a committee chair is vacated)

SECRETARY
• Records alumni group meeting minutes
• Works with treasurer to track membership roster and maintain accurate records
• Sends updates to membership for events and meetings
• Submits post-event forms via DocuSign and tracks group progress in meeting desired tier

TREASURER
• Creates and manages bank account ledger
• Audits bank account expenditures monthly
• Works with board to approve and track alumni association reimbursement requests for events through DocuSign
• Files annual tax forms through the IRS and shares completed form with alumni association staff contact
MEMBERSHIP CHAIR

- Checks the names of those eligible for membership
- Encourages non-members to join the alumni group
- Works with secretary to maintain an accurate list of members and submits roster to alumni association staff contact annually
- Creates opportunities to thank and strengthen membership through special events, awards, giveaways and other methods
- Encourages alumni to become sustaining members of the alumni association

EVENTS AND MEETINGS CHAIR

- Organizes group meetings and events
- Works with board members to publicize meeting and event information in a timely manner
- Works with alumni association staff contact to brainstorm ideas, discuss how events count for the various categories, pre-approve expenditures for reimbursement (when applicable), and secure any other resources necessary for the event to be successful

SCHOLARSHIP CHAIR

- Serves as the liaison between the alumni group and the Alumni Scholars Program stewardship coordinator (clubs only)
- Distributes scholarship applications, screens applicants, and provides recommendations to the stewardship coordinator
- Identifies appropriate ways to recognize scholarship recipients

COMMUNICATIONS CHAIR

- Creates and manages alumni group social media accounts
- Works with regional alumni communications managers to secure emails and print pieces to promote alumni group activities
- Maintains group website, providing frequent updates and photos to keep site active
- Ensures group communications use approved university logos and images, and follow university brand guidelines
HOW TO: RECRUIT ALUMNI GROUP VOLUNTEERS

- **HARNESS HEAT AND AGGREGATE DATA:** You can request information on your alumni base from your alumni association staff contact. Alumni population data relevant to your group may include age, major and location.

- **USE SURVEYS:** Whether in-person or online, surveys can be an effective tool to understand who might be interested in volunteering with your organization. The alumni association has used surveys to generate interest and receive feedback, and can send one to alumni on your behalf.

- **HOST A VOLUNTEER MEET-AND-GREET EVENT:** An alumni networking event provides an opportunity for your leaders to share the positive impact of volunteering and get alumni excited about volunteering with your group.

- **FIND ALUMNI THROUGH SOCIAL MEDIA:** [Linkedin.com](https://linkedin.com) and [osu.alumnifire.com](https://osu.alumnifire.com) are great ways to search for and connect with alumni based on career and location.

- **EMPOWER YOUR MEMBERSHIP:** The road to recruiting a group officer can start with small steps. Ask some of your more committed members to help with short-term projects or events, thank them for their service and encourage them to serve on your board.

- **MARKETING YOUR VOLUNTEER OPPORTUNITY:** Utilize resources at the alumni association — email, web and print support — to share information with your alumni base. Additionally, you can post your volunteer opportunity on VolunteerMatch at [volunteer.osu.edu](http://volunteer.osu.edu).

VOLUNTEER TRAINING AND DEVELOPMENT

- **OFFICER TRANSITION DOCUMENTS:** Keeping detailed notes and documents is helpful when transitioning an officer. You could keep a binder for each board role and/or keep pertinent files on a group file-sharing website.

- **ALUMNI GROUPS WEBSITE:** This website contains best practices, forms and other resources to help our alumni groups succeed. Visit [groups.alumni.osu.edu](http://groups.alumni.osu.edu).

- **WEBINARS:** The alumni association offers virtual trainings and webinars throughout the year. Information on upcoming webinars will be shared in *The Nutshell*.

- **ALUMNI CLUB AND SOCIETY LEADERSHIP SYMPOSIUM:** New members are encouraged to attend the symposium each fall to meet other group leaders, learn best practices and celebrate being a volunteer.

- **ALUMNI ASSOCIATION STAFF:** Your alumni association staff contact is happy to connect with any new members to answer questions and connect them to resources and other volunteers.

- **RETREAT PLANNING AND GOAL SETTING:** It may be helpful to coordinate a retreat for new and existing volunteers to share expectations, plan for the year, set goals and build teamwork.
RETREAT PLANNING

Your alumni group’s board of governors might benefit from planning an annual or biannual retreat. The retreat will allow volunteers to provide input on the vision and direction of the alumni group, set expectations for each other, and may help the group plan goals and events for the year.

Some other benefits of a retreat model:
• Creates focus for the year ahead
• Energizes the board and gives everyone a voice
• Sets expectations and leads to better accountability
• Makes it easier to meet deadlines
• Secures buy-in from your volunteers and empowers them to take ownership of their roles

GOAL SETTING

As you set goals, keep in mind which goals are short-term and which are long-term. This helps the group effectively and realistically set priorities for the future.

EXAMPLES:

<table>
<thead>
<tr>
<th>Short-term goals focus on</th>
<th>Long-term goals focus on</th>
</tr>
</thead>
<tbody>
<tr>
<td>Events</td>
<td>Event calendar for year</td>
</tr>
<tr>
<td>Football season</td>
<td>Membership growth</td>
</tr>
<tr>
<td>Fundraising</td>
<td>Succession planning</td>
</tr>
</tbody>
</table>

Additionally, setting SMART goals is recommended to help your group ultimately measure and meet your goals.

S = Specific (simple, sensible, significant)
M = Measurable (meaningful, motivational)
A = Achievable (agreed, attainable)
R = Relevant (reasonable, realistic and resourced)
T = Time bound (time-based, time-limited, time/cost-limited)

Examples:
• Increase membership to 250 by October 31, utilizing game day events, postcards and email blasts
• Set dates for three category I events by December meeting
## Alumni Club Incentive Grid

<table>
<thead>
<tr>
<th></th>
<th><strong>CARMEN</strong></th>
<th><strong>GRAY</strong></th>
<th><strong>SCARLET</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Events</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Minimum requirements</td>
<td>Game day</td>
<td>Minimum 2 board meetings</td>
<td>Game day</td>
</tr>
<tr>
<td></td>
<td>Game day</td>
<td>Minimum 2 board meetings</td>
<td>Minimum 2 board meetings</td>
</tr>
<tr>
<td></td>
<td>Minimum 2 board meetings</td>
<td>3 category I events</td>
<td>5 category I events</td>
</tr>
<tr>
<td></td>
<td>3 category I events</td>
<td>Scholarship fundraiser</td>
<td>Scholarship fundraiser</td>
</tr>
<tr>
<td><strong>Incentive</strong></td>
<td></td>
<td>$1,000</td>
<td>$2,000</td>
</tr>
<tr>
<td>At the start of each fiscal year, incentive deposited in current use funds or disbursed on when tier is reached</td>
<td>–</td>
<td>$1,000</td>
<td>$2,000</td>
</tr>
<tr>
<td><strong>Speakers/Year</strong></td>
<td></td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Travel expenses covered by The Ohio State University Alumni Association for Ohio State sponsored speaker/year</td>
<td>–</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td><strong>Mailing/Year</strong></td>
<td></td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Number of printed mailings allotted to each club/society year</td>
<td>–</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td><strong>Awards/Recognition</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>To be awarded at the end of the fiscal year at the symposium</td>
<td>–</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td><strong>Forms/Documentation</strong></td>
<td>Required</td>
<td>Required</td>
<td>Required</td>
</tr>
<tr>
<td>Returned attendance sheets/post-event forms/membership and officer rosters</td>
<td>Required</td>
<td>Required</td>
<td>Required</td>
</tr>
<tr>
<td><strong>Board/Leadership Team</strong></td>
<td>Required</td>
<td>Required</td>
<td>Required</td>
</tr>
<tr>
<td>Develop and utilize a volunteer board or leadership team with a minimum of 4 volunteers who are Life or Sustaining Members of The Ohio State University Alumni Association</td>
<td>Required</td>
<td>Required</td>
<td>Required</td>
</tr>
</tbody>
</table>
To reach the Scarlet or Gray levels, a variety of category I events is required. For instance, to meet the Gray tier, three different types of category I events are required, out of the eight. When hosting a series of the same type of event, such as a networking series, the entire series only counts as one type of category I when measuring the club/society level.

- All clubs must host a game day event, scholarship fundraiser and at least 2 board meetings on an annual basis.
- Scarlet and Gray level alumni groups may be reimbursed up to 3 times per fiscal year per each of the eight category I event types for a total of up to 24 events.

*In order to qualify a networking event for the $500 reimbursement, you must include a formal networking activity within the event.

** Your first wellness event can be reimbursed up to $500, and subsequent wellness events can be reimbursed up to $250.

### REQUIRED EVENTS

<table>
<thead>
<tr>
<th>Event</th>
<th>Reimbursement Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum 2 board meetings</td>
<td>Up to $50, 10x per year</td>
</tr>
<tr>
<td>Scholarship fundraising</td>
<td>N/A</td>
</tr>
<tr>
<td>Game days</td>
<td>N/A</td>
</tr>
</tbody>
</table>

### CATEGORY 1 EVENTS

<table>
<thead>
<tr>
<th>Event</th>
<th>Reimbursement Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community service</td>
<td>Up to $250</td>
</tr>
<tr>
<td>Student programming</td>
<td>Up to $250</td>
</tr>
<tr>
<td>Networking*</td>
<td>Up to $500</td>
</tr>
<tr>
<td>Special interest</td>
<td>Up to $250</td>
</tr>
<tr>
<td>Arts</td>
<td>Up to $250</td>
</tr>
<tr>
<td>Lifelong learning</td>
<td>Up to $250</td>
</tr>
<tr>
<td>Diversity</td>
<td>Up to $250</td>
</tr>
<tr>
<td>Wellness**</td>
<td>Up to $500</td>
</tr>
</tbody>
</table>
### ALUMNI SOCIETY INCENTIVE GRID

<table>
<thead>
<tr>
<th></th>
<th>CARMEN</th>
<th>GRAY</th>
<th>SCARLET</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EVENTS</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Minimum requirements</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Minimum 2 board meetings</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• 5 category I events</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Unlimited category II events</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Scholarship fundraiser</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>INCENTIVE</strong></td>
<td>–</td>
<td>$1,000</td>
<td>$2,000</td>
</tr>
<tr>
<td>At the start of each fiscal year, incentive deposited in current use funds or disbursed on when tier is reached</td>
<td>–</td>
<td>$1,000</td>
<td>$2,000</td>
</tr>
<tr>
<td><strong>SPEAKERS/YEAR</strong></td>
<td>–</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Travel expenses covered by The Ohio State University Alumni Association for Ohio State sponsored speaker/year</td>
<td>–</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td><strong>MAILING/ YEAR</strong></td>
<td>–</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Number of printed mailings allotted to each club/society year</td>
<td>–</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td><strong>AWARDS/ RECOGNITION</strong></td>
<td>–</td>
<td>–</td>
<td>• Club/Society of the Year = $2,500</td>
</tr>
<tr>
<td>To be awarded at the end of the fiscal year at the symposium</td>
<td>–</td>
<td>–</td>
<td>• Most Innovative Program of the Year = $1,500</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Program of the Year = $1,000 (3)</td>
</tr>
<tr>
<td><strong>FORMS/ DOCUMENTATION</strong></td>
<td>Required</td>
<td>Required</td>
<td>Required</td>
</tr>
<tr>
<td>Returned attendance sheets/post-event forms/membership and officer rosters</td>
<td>Required</td>
<td>Required</td>
<td>Required</td>
</tr>
<tr>
<td><strong>BOARD/ LEADERSHIP TEAM</strong></td>
<td>Required</td>
<td>Required</td>
<td>Required</td>
</tr>
<tr>
<td>Develop and utilize a volunteer board or leadership team with a minimum of 4 volunteers who are Life or Sustaining Members of The Ohio State University Alumni Association</td>
<td>Required</td>
<td>Required</td>
<td>Required</td>
</tr>
</tbody>
</table>
To reach the Scarlet or Gray levels, a variety of category I events is required. For instance, to meet the Gray tier, three different types of category I events are required, out of the eight. When hosting a series of the same type of event, such as a networking series, the entire series only counts as one type of category I when measuring the club/society level.

- All clubs must host a game day event, scholarship fundraiser and at least 2 board meetings on an annual basis.
- Scarlet and Gray level alumni groups may be reimbursed up to 3 times per fiscal year per each of the eight category I event types for a total of up to 24 events.

*In order to qualify a networking event for the $500 reimbursement, you must include a formal networking activity within the event.

** Your first wellness event can be reimbursed up to $500, and subsequent wellness events can be reimbursed up to $250.

<table>
<thead>
<tr>
<th>REQUIRED EVENTS</th>
<th>REIMBURSEMENT AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum 2 board meetings</td>
<td>Up to $50, 10x per year</td>
</tr>
<tr>
<td>Scholarship fundraising</td>
<td>N/A</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CATEGORY 1 EVENTS</th>
<th>REIMBURSEMENT AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community service</td>
<td>Up to $250</td>
</tr>
<tr>
<td>Student programming</td>
<td>Up to $250</td>
</tr>
<tr>
<td>Networking*</td>
<td>Up to $500</td>
</tr>
<tr>
<td>Special interest</td>
<td>Up to $250</td>
</tr>
<tr>
<td>Arts</td>
<td>Up to $250</td>
</tr>
<tr>
<td>Lifelong learning</td>
<td>Up to $250</td>
</tr>
<tr>
<td>Diversity</td>
<td>Up to $250</td>
</tr>
<tr>
<td>Wellness**</td>
<td>Up to $500</td>
</tr>
</tbody>
</table>
COMMUNICATIONS SUPPORT AND BEST PRACTICES

TOOLKIT
• Each alumni group has a digital toolkit that includes logos specific to the alumni group, Buckeye art, social media avatars and templates for business cards, newsletters and more.
• Alumni groups are approved to use their toolkit images in marketing materials. The logos have been designed to meet Ohio State brand standards and therefore cannot be altered.
• The toolkit has multiple files of the same logo in case the group is working with a vendor who needs a certain file format.
• To access your group’s branding toolkit please reach out to your alumni association staff contact.

MERCHANDISE
• Merchandise featuring your group’s logo and website is a great promotional tool for your group, and makes great giveaways, membership incentives and event prizes.
• To have your logo printed on non-apparel items — koozies, bottles, nametags, etc. — you must use an approved university vendor. Find a list of vendors at go.osu.edu/approvedvendors. Before printing, you must also submit any artwork and/or logos to the university’s Trademark and Licensing Services for feedback and approval.
• You are welcome to use a local vendor to produce apparel items such as shirts, hats, etc. Prior to ordering, please share an official proof with your alumni association staff contact to ensure the design meets all Ohio State brand guidelines and to create a one-time use agreement with your vendor.

SOCIAL MEDIA
• Alumni groups are encouraged to create and maintain their own social media accounts. Examples include Facebook, Twitter, LinkedIn and Instagram.
• Groups are encouraged to use social media avatars from their digital toolkits as account profile photos.
• Use official Ohio State hashtags when posting content to help share your information across all of Buckeye Nation.
• Groups can pay to boost a specific event to help increase awareness and attendance.
• For more information on developing an alumni group social media account and for a list of Ohio State hashtags, please visit go.osu.edu/alumnigroupsocial.
WEBSITE
• The alumni association can set up and host a website for your group.
• New websites can take up to six weeks to create. Updates take one to three days, Monday through Friday.
• Benefits of a website:
  o An online presence and resource for your group
  o Analytics to measure how frequently your website is visited
  o Plugins for PayPal, Square and forms for event registration
  o Donate button that allows for online donations to the group’s scholarship account
  o Links to group social media accounts and university resources

EMAIL
• The alumni association can create and send emails on behalf of your alumni group.
• To request an email, alumni clubs should visit go.osu.edu/clubrequests and alumni societies should visit go.osu.edu/societyrequests.
• Requests for email should be made at least two weeks prior to the ideal send date. Depending on the timing of your event, a reminder email can also be sent.
• Benefits of emails include:
  o Sharing information with local alumni outside of your membership
  o Analytics to measure the reach and engagement of your messages
• Ohio State branded messages are delivered from your group’s osu.edu email. Any responses to the email will automatically be forwarded to the person(s) on your group’s board whose email is linked to the osu.edu address.

PRINT
• The alumni association can create and send print pieces such as membership postcards and event invitations on behalf of your alumni group.
• Requests for print pieces should be made at least six weeks prior to your ideal arrival date.
• Scarlet-level groups receive two free print pieces each fiscal year and Gray-level alumni groups receive one. Groups may request and pay (printing and postage) for additional print pieces.

Alumni who need to update their contact information to receive these communications should visit go.osu.edu/updateyourinfo or contact 1-800-762-5646
**HOW TO: EVENTS**

Group events provide opportunities for Buckeyes around the world to come together with their fellow alumni. Events allow alumni to experience fellowship, learn together, and see new things, all while having fun and remembering how “dearly we love O-HI-O.”

The following types of events will count towards your tier status for the next fiscal year. For more information, check out the Events Checklist and Suggested Events information on the following pages.

### COMMUNITY SERVICE*
- Active, hands-on community service opportunity
- Does not include making charitable donations
- Examples: serving a meal at a soup kitchen, cleaning up a local park, food-packing

*April is the alumni association’s Month of Service when we encourage each alumni group to perform an act of service in April.

### DIVERSITY/CULTURE
- An event that to educates alumni about and/or celebrates cultural diversity
- Examples: speaker presenting on diversity topics, viewing of a film with strong historical and/or social justice themes

### STUDENT PROGRAMMING
- Events that allow members to engage in student recruitment or programming
- All recruitment events are in accordance with the policies and procedures of Undergraduate Admissions and First Year Experience (clubs only)
- Examples: Summer Send Off event, Winter Break Catch Up, Buck-I-Serv dinner, Dinner for 12 Buckeyes

### SPECIAL INTEREST
- Structured event or events that feature a specific area of interest held by a significant number of group members
- Examples: speaker with expertise on a subject of interest to the group; Scarlet and Grapes, Buckeyes Who Brunch, Homecoming Reunion

### ARTS
- Event that serves to educate and/or celebrate the fine and/or performing arts
- Examples: attend a live theater event, social painting events, visit an art museum

### LIFELONG LEARNING
- An educational event that aims to continue learning and development among participants
- Example: book club, Buckeye evening with guest from the alumni association’s speakers list, wine or beer tasting

### NETWORKING
- Events that create opportunities for alumni and fans to connect professionally and socially.
- Event must have a formal networking component/activity.
- Description of networking component/activity must be included in DocuSign form.
- Activities: formal business card exchange, Networking Bingo, Buckeyes After Work

### HEALTH AND WELLNESS
- Events that focus on being aware of and making choices toward a healthy and fulfilling life. Events can focus on any of the nine dimensions of health and wellness: physical, emotional, financial, spiritual, social, career, intellectual, creative and environmental
- Examples: tai chi, finance workshop, 5K, yoga, healthy cooking class, attending an interfaith dialogue
REQUIRED EVENTS

GAME DAYS (CLUB ONLY)
• Organize and gather members to view an Ohio State sporting event in a local establishment
• Each group must have at least one per fiscal year
• Events are not reimbursable

BOARD MEETINGS
• Each group must have at least two board meetings each year
• Scarlet-level groups and Gray-level groups can request reimbursement of up to $50, 10 times per fiscal year
<table>
<thead>
<tr>
<th>EVENT CHECKLIST</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Date</strong></td>
</tr>
<tr>
<td><strong>Time</strong></td>
</tr>
<tr>
<td><strong>Location</strong></td>
</tr>
<tr>
<td><strong>Event Purpose</strong></td>
</tr>
<tr>
<td><strong>Theme</strong></td>
</tr>
<tr>
<td><strong>Target Audience</strong></td>
</tr>
<tr>
<td><strong>Estimated Attendance</strong></td>
</tr>
<tr>
<td><strong>Contact Person</strong></td>
</tr>
<tr>
<td><strong>Insurance Needed</strong></td>
</tr>
<tr>
<td><strong>Volunteers/Club Members On-site</strong></td>
</tr>
<tr>
<td><strong>Guest List/Registration</strong></td>
</tr>
<tr>
<td><strong>Invitations</strong></td>
</tr>
<tr>
<td><strong>RSVP Date and Who’s Collecting</strong></td>
</tr>
<tr>
<td><strong>Event Program/Itinerary</strong></td>
</tr>
<tr>
<td><strong>Speakers</strong></td>
</tr>
<tr>
<td><strong>Budget Available for Event</strong></td>
</tr>
<tr>
<td><strong>Expenses Incurred</strong></td>
</tr>
<tr>
<td><strong>Cost for Attendees</strong></td>
</tr>
<tr>
<td><strong>Space Reserved</strong></td>
</tr>
<tr>
<td><strong>Caterer Secured</strong></td>
</tr>
<tr>
<td><strong>Beverages (tickets provided; cash or open bar)</strong></td>
</tr>
</tbody>
</table>
Event Checklist by Suggested Timeline

12 Weeks Before
- Event steering committee meets to select theme, time, date and location of the event
- Reserve event venue
- Make deposit arrangements for venue and/or caterer

10 Weeks Before
- For larger, signature events, submit a request through Workfront for a print piece

6 Weeks Before
- Using Workfront, request an email to invite your club or society’s alumni audience
- Reach out to volunteers to ensure you have a person to:
  o Welcome attendees
  o Introduce speaker/program/activity
  o Mingle with attendees before and during the event
  o Guide people to the registration table
- Speak with venue contact to ensure your menu is set and AV/room needs are available

5 Days Before
- Confirm number of attendees with caterer
- Confirm final details with venue
- Purchase nametags for event, if necessary

Day of Event
- Arrive early to check and set up the event space
- Event steering committee arrives early to set up and ensure logistics are complete
- Set up registration table, check in guests and provide nametags
- Ensure volunteers are fulfilling their assigned roles
- Reconcile bill with venue and/or caterer

1 Day After
- Upload attendance sheets and receipts, if necessary, to the post-event reporting form through DocuSign

1 Week After
- Send thank-you notes to speaker and any volunteers
HOW TO: DOCUSIGN

• Within 30 days of your event, please submit the DocuSign post-event form at go.osu.edu/posteventform.
• For your group to achieve Scarlet or Gray tier levels each fiscal year, you must submit events through DocuSign.
• Your group is able to receive reimbursements if you have fulfilled the requirements for Scarlet or Gray tier status the previous fiscal year.
• Game day/game watch events are not reimbursable.
• The following items are required when submitting:
  • Completed DocuSign form
  • Attendance sheet
  • Itemized receipts (if requesting reimbursement) and proof of payment
  • Board meeting minutes (if applicable)
  • If requesting reimbursement, you will be prompted to add the names/email addresses of two board members who must be different than the person initiating the form.
Club & Society Post Event & Reimbursement Form

Please fill this form out in its entirety. Board member approval for reimbursement must come from two board members to be reimbursed and must not be related. This form must be submitted no later than 30 days post-event to be considered for reimbursement.

Name of person submitting report: President
Email of person submitting report: president@buckeye.com
Phone of person submitting report: 614-222-2222
Name of Club/Society: The Alumni Club of The Ohio State University
Event Name: Speaker Event
Event Date: August 31, 2018
Event Time: 6 p.m.
Category I Event Type: ☐ Arts ☐ Community Service ☐ Diversity ☒ Lifelong Learning ☐ Board Meeting
☐ Networking ☐ Special Interest ☐ Student Recruitment or Retention/Summer Send off
Number of Attendees: 6
Reimbursement Amount: $217.75

Do you have Itemized Receipts, Attendance Sheets, Minutes or Agenda to attach? ☒ Yes ☐ No
(Due to large file sizes please do not attach photos of your event, which you can e-mail directly to your OSUAA staff contact.)

Description of Event (Please include details of expenses):
We hosted Brutus Carmen, M.D., to talk about his research on why Ohio State Football is the best.

Board Member Approval

Secretary
Board Member 1 Name: Secretary
Board Member 1 Email: secretary@buckeye.com

Treasurer
Board Member 2 Name: Treasurer
Board Member 2 Email: treasurer@buckeye.com

*Example
If your group plans to gather with alumni, parents and friends of the university, take some time to plan your game day parties and help ensure a flawless experience for everyone involved. Here are a few tips to make your celebration a success:

- Make sure you have a safe, fun and accessible location to watch the game that your group secures in advance. Meet with the establishment contact to discuss logistics and explore ways in which your group and establishment can support fundraising goals.
- Securing benefits, such as sound for the game and a private or semi-private area, is necessary for creating an enjoyable experience for your Buckeyes.
- Start promoting your game day parties as soon as possible. Post events to Facebook and other social media networks, email your club list and check the association’s website to make sure we have your correct, updated location (go.osu.edu/gamedayevent). We have special game day graphics that can be customized for your club on request.
- Game day is a great time to have fun while making connections that will grow your group and help reach fundraising goals.
  - If at all possible, assign volunteers to stations to assist with event execution such as selling raffle tickets to fundraise and signing in members and guests (obtaining contact information for future communication).
- Show your Buckeye spirit by decorating the space with official Ohio State gear!
- Take a lot of pictures for your social media accounts and website following the game.
- Game days also serve to promote Ohio State’s values and keep alumni, family and friends connected no matter their distance from campus.
- As always, celebrate responsibly.
- Use commercial breaks and halftime to make announcements about upcoming events, conduct raffles and award prize winners.
- After the game, invite everyone back to watch the next Buckeye victory! Be sure to follow up with a thank-you message to event attendees as well as event volunteers.

*These practices apply to alumni clubs, but societies could host game day experiences for away games.
SPEAKERS LIST

Scarlet-level and Gray-level alumni groups have the ability to request one speaker per fiscal year for an alumni event from a list of over 90 Ohio State faculty, staff and alumni. The alumni association covers the cost of the speaker’s travel and makes all arrangements as long as the speaker is on the speaker’s list. More information on our speakers list and the request form can be found at groups.alumni.osu.edu/speaker-list.

SPEAKERS LIST GUIDELINES

• The speaker request form should be completed at least three months prior to the earliest proposed event date. This provides time to make requests and travel arrangements, and provides your group time to market the event.
• Groups will be expected to pick their speakers up from the airport and drive them to and from the hotel, airport and event.
• Groups will be expected to provide the speaker’s meal if the event is during a lunch or dinner.
• Groups will be expected to supply speakers with A/V equipment — microphone, podium, projector, etc. — for presentations.
• It is not necessary for groups to provide a gift or monetary compensation to the speaker.
• Speakers will be expected to present for at least 30 minutes (including Q&A). Make sure that this is accommodated for in the agenda and timeline of the event.
• Follow up with your alumni association staff contact shortly to share any feedback on the event and the speaker’s performance.
MEMBERSHIP

Many alumni groups develop loyalty and generate funding by creating a membership structure. The membership cycle, cost for dues and benefits are determined by each alumni group. The club and society constitutions outline who is eligible for membership and who can vote on group matters, and state that the group should have one membership meeting each year.

EXAMPLES OF MEMBERSHIP BENEFITS (FOR DUES OR DONATION-BASED MODELS)

- Alumni group swag — shirts, koozies, bumper stickers, tumblers, etc.
- Discounts at a game day location, on future events or at local businesses
- Access to request Ohio State football tickets through the alumni group allotment
- Access to special parking or seating at an event
- Access to your group’s e-newsletter
- Ability to vote on alumni group matters
- General support for alumni group operations and/or scholarships

DONATION-BASED CURRENT USE FUND (NEW OPPORTUNITY)

This is an optional membership account that the alumni association can help you set up with the university foundation. For questions or to set up a current use fund for your alumni group, please call your alumni association staff contact.

ABOUT DONATION-BASED CURRENT USE FUNDS

- Supports the programs and activities of the alumni group
- Funds are housed with the university foundation
- $25 minimum for yearly dues
- Life membership is available, if paid within one year, by December 31
- Use the term of either sustaining or active member
- Annual recognition is tracked in the university foundation database, TAS, from January 1 – December 31
- Gift is tax-deductible
- Sample language is available to help your group market this opportunity, and can be requested through your alumni association staff contact
- Easy to request the funds to be transferred to your group’s checking account
- No interest earned on the fund
HOW TO: PROVIDE SCHOLARSHIPS

Providing scholarships to incoming and current students is a point of pride among our alumni groups. Clubs and societies around the world have provided over $1 million in scholarships to students!

Alumni societies provide scholarships to current students.

Club leaders have the chance to participate in the Alumni Scholars Program. The Alumni Scholars Program (ASP) is an opportunity for alumni clubs to recruit exemplary students from their local area, help them financially and encourage them to attend Ohio State.

We suggest creating a scholarship committee to review applications and interview students.

For more information: go.osu.edu/aspscholarship.

HOW TO: FUNDRAISE

Raising funds for student scholarships and group operating funds is an important part of membership. Below are some of the many ways alumni groups raise money.

PEER TO PEER FUNDRAISING: BUCKEYE FUNDER

- Ohio State’s own crowdfunding tool
- Use for special projects for your group
- For more information visit buckeyefunder.osu.edu

TRADITIONAL FUNDRAISING

- Silent auctions
- 50/50 raffles
- Live auctions
- Prize raffles
- Solicitation letters
- Giving link on alumni group website
- Direct donations (iGive tax credit for individuals)
FINANCE

Alumni groups manage their own funds, including monies gained from membership, event revenue and fundraising for scholarships. Groups should have a local checking account to allow for safe, electronic financial record-keeping, and so that the alumni association has a way to deposit incentive/reimbursement funds.

EXPECTATIONS AND BEST PRACTICES

• Two or more people must count and record monies collected at events. This must be done prior to leaving the facility and then documentation should be provided at meetings confirming accurate deposit.
• Transition to electronic record-keeping, if you haven’t already.
• Two signatures are required on each bank account and all financial transactions.
• Max of two local accounts (group checking account and group savings account) per alumni group.
• President and treasurer have access to all banking documents.
• Monthly or weekly monitoring of all financial activities by president and treasurer to ensure account accuracy.
• Monthly bank statements should be sent from the bank directly to the treasurer and president, who should check the statements for accuracy.
• Email is an acceptable delivery method but should be directly from the bank.

NEW GROUPS

• Visit: go.osu.edu/taxsupport for more information on applying for an EIN and tax-exempt status.

EXISTING GROUPS

• Alumni groups should maintain tax-exempt status as a 501(c)4 or 501(c)7 organization, which ensures your group doesn’t have to pay federal income tax on revenue.
• Treasurer or president must fill out an annual 990 e-postcard from the IRS within five months of the end of the group’s tax year. To file a 990 postcard with the IRS please visit: go.osu.edu/990filing
• Groups that fail to complete their annual filing requirement for three consecutive years are subject to losing their tax-exempt status and are subject to penalties and reinstatement fees.
• To check your current tax-exempt status and/or federal income tax filing history visit the IRS website at apps.irs.gov/app/eos/. Once at this site you will need the group EIN number.
• Should issues or questions arise, the alumni association has partnered with a third party company to offer tax and financial support to groups in need of assistance, visit: go.osu.edu/taxsupport.
AWARDS AND RECOGNITION

Each year, Scarlet-level alumni groups are recognized as Outstanding Alumni Groups at the Club and Society Leadership Symposium. Groups receive a flag the first year that they are honored as Scarlet, and a patch with the year to be added to the flag each subsequent year they maintain Scarlet-level status.

Additionally, Scarlet-level groups are eligible to apply for awards based on several criteria. Nomination criteria, forms and deadlines are communicated each summer and the award winners are honored at the symposium.

ALUMNI GROUP OF THE YEAR AWARD
One club and one society will be selected and recognized as Club of the Year and Society of the Year. Groups that receive this award must exemplify the mission and values of The Ohio State University Alumni Association and university as a whole, with volunteer efforts that exceed expectations and excel in all areas. The selected groups are awarded $2,500.

INNOVATIVE PROGRAM OF THE YEAR AWARD
One club and one society are selected for this award. The Innovative Program of the Year award celebrates new and unique programming initiatives planned and executed by Scarlet-level alumni groups. Each group may only nominate one program. The selected groups are awarded $1,500.

PROGRAM OF THE YEAR AWARD
Three clubs and three societies are selected for this award. The Program of the Year award celebrates a programming initiative that is superior to all others. Each group may nominate more than one program, but can only be recognized once. The selected groups are awarded $1,000.

BUCKEYE BUZZ
Share your alumni group accomplishments and points of pride by submitting a quick description (2-4 sentences) and a photo to go.osu.edu/groupbuzz. Your event may be featured in the official e-newsletter for alumni clubs and societies, The Nutshell, and/or on alumni association social media accounts.