OU Alumni Club and Society Policies

The University and the Alumni Association support the function and spirit of Alumni Clubs however OU Alumni Clubs and Societies are independent and separate from the University of Oklahoma.

Alumni Clubs and Societies are NOT TAX EXEMPT.

Constitution - An updated constitution including operating policies and by-laws should be signed by ten members of the club and submitted to the Alumni Association every other year.

Leadership - The leadership roster held by the Alumni Association will be accepted as the official listing of officers of record. Any changes made in leadership during the year need must be submitted in writing to the club manager and an updated leadership roster produced for the club's record/file

- An updated leadership roster will be submitted each year following elections as directed by the club constitution.

Release of Club information

- A charter must be on file before any information can be released.
- A confidentiality agreement MUST BE ON FILE for an individual before any of the following information can be released to them:
  o Alumni Directory listings (Any officer with a confidentiality agreement)
  o Current students listings (Any officer with a confidentiality agreement)
  o Prospective Student Information (President or Scholarship/Recruitment officer)
  o Financial Information - Club account statements or any detailed records of Club Foundation Accounts will only be released to the club president or club treasurer as indicated on the leadership roster at the Alumni Association. (More on club finances below)

Club Finance:

- Each Club or Society has an account established for them at the OU Foundation. Any deposits or requests for payments for club activities can be sent to your club manager.
- Some clubs choose to have both an operating and a scholarship account. Funds in an operating account may be used for any purpose deemed appropriate by the club (e.g. watch party decorations, auction items, prepayment for event space etc) while scholarship account may only be used to provide OU students with scholarships.

Deposits
Communications

- All Checks should be made out to the **OU FOUNDATION**. All checks should be mailed or delivered to the Alumni office as soon as possible after receipt.
- Credit Card numbers should not be accepted by clubs except online at the Foundation designated club page or an approved secure third party.*** (needs further discussion)
- Cash is discouraged but in the event that it is a necessary business practice, cash should be converted to money orders made payable to the OU Foundation. Cash should never be mailed. It should be made very clear to participants/donors that **cash will not be applicable for tax receipt**
- **Cash should not be deposited into a personal bank account.**
- Our Finance Director will deposit the money into your specific OU Club or Society Account.
- Club and Society statements are reconciled at the beginning of each month and the balances of any accounts associated with the club are available at any time from the Alumni Association staff.

Expenditures

- Club expenditures are at the discretion of the board of elected officers, with the exception of funds limited by the nature of a particular Foundation fund agreement (e.g. Scholarship funds, endowment principles etc) and must be approved in writing by the club treasurer or president.
- Reimbursements to individuals must be submitted by or **signed off by the club President or Treasurer**. When possible, you should not approve your own expense. When other officers are available.
- An **ORIGINAL RECEIPT** and explanation of expense must accompany reimbursement requests.

Gift Receipts and Donations:

- Donations of funds made to your club will receive a tax letter of receipt from the Foundation. Only gifts made by check or by credit card online will receive a tax gift letter. If cash is accepted at club events or functions, no tax letter will be produced for those donations.
- Any gifts in kind (e.g. donations of goods or services other than money) can be accepted but should be accompanied by a gift receipt. Contact the Alumni Association staff for more details on gifts in kind.

Communications

- **Campaign newsletter** – Newsletters go out once a year to alumni in your defined constituency at no cost to your club. The newsletter is primarily used as a fundraising tool, to promote events and provide club/society information.
- **Postcards and other mailings** – For most mailings allow four total weeks to produce, print and mail your invitation, postcard or flyer. You must provide to your club manager the text needed to produce the mailing. You will receive a proof before it is printed which you need to approve before the mailing will be produced at cost to the club.
- **Broadcast Emails** – Emails may also be produced and be broadcast to OU Alumni in your area. Guidelines are similar to those of printed postcards. Check with your club manager for details.
Scholarships – Follow the guidelines set by the Alumni Association regarding awarding scholarships.

- Scholarship award notifications MUST BE SUBMITTED BY THE CLUB PRESIDENT OR SCHOLARSHIP OFFICER OF RECORD to the appropriate club manager.
- No award notifications should be made to students until the club manager has verified the amount required is available to the club in a Foundation account.
- When announcing/notifying scholarship winners the following should be made explicitly clear:
  - The matching portion of any club scholarship, provided by OU, is applicable ONLY as a tuition waiver. For students receiving other scholarships or tuition waivers, the OU CLUB MATCH WILL ONLY COVER TUITION AS NEEDED. THE OU CLUB SCHOLARSHIP MATCH IS NOT APPLICABLE FOR FEES, HOUSING CHARGES, BOOKS OR ANY PURPOSE OTHER THAN TUITION. The cash portion of the award, provided by the OU Alumni Club, is presented as a check made payable to the student and may be used for anything the student deems fit.
  - Both cash portions and matches are split equally between fall and spring semesters unless the club makes other arrangements through the club manager.
  - Scholarships not claimed by students who do not ultimately attend OU or transfer out halfway during the award period etc. are returned to the club's Foundation account.
  - No outside body can award scholarships. Club scholarships must be awarded by the governance of the club.
  - Find forms for submitting scholarship awards at http://www.ou.edu/content/dam/alumni/images/Clubs/clubsClub_resources.html

Website Policy
- Make sure you are registered at alumni.ou.edu. After you are registered let your club manager know the login name that you (or the person who will be editing your page) will use on the site. The Alumni Association will add your name as an administrator for your club’s page. For more information and detailed instructions editing, see the PDF document,
  - Editing Your Club Webpage at http://www.ou.edu/alumni/home/clubs/clubsClub_resources.html

Use of University Logos - The University of Oklahoma Department of Trademark Licensing
- Nationally and internationally, the public identifies The University of Oklahoma and the excellence it has come to represent through the University’s name and the graphic representations of identity. OU’s recognition has created a great value in the University's name and symbols, resulting in public trust and confidence in the University and economic rewards that benefit the University and its faculty, staff and students.
- The Department of Trademark Licensing promises to protect and promote OU’s reputation in the classroom and on the field by ensuring proper usage of its marks.
- The attached logo sheet illustrates the registered trademarks of the University.
- To ensure consistency among all OU Clubs, we have created two template logos that we
ask all Clubs to use. These logos can be obtained from Amy Spehar, Director of Alumni Communications, by emailing aspehar@ou.edu.

- Any use of these or other logos, word marks or verbiage included in the attached sheet must be approved by the Department of Trademark Licensing and must be produced by an approved OU licensee.
  - Prior to production, please fill out the internal university licensing form that can be found at http://soonersports.com/licensing/.

- If you have any questions about the use of the marks, please contact Department of Trademark Licensing at (405) 325 7008, by email at oulicensing@ou.edu, or visit our website at http://soonersports.com/licensing/.

- See Logo Sheet at http://www.ou.edu/content/alumni/home/clubs/club_resources.html

**Pulling a charter** - The Alumni Association reserves the right to discontinue the support of an alumni club at any time should it be determined by the Executive Director that the club no longer fulfills the purpose or mission of an OU Alumni Club.

- A club will be considered inactive if any of the following occur:
  - A leadership roster is not submitted for more than two years
  - An updated constitution is not submitted for more than three years.

INSERT STAFF CONTACT SHEET