Dear OU Club & Society Leaders,

Thank you for everything you do to support the University of Oklahoma! All of us here in the Alumni Association deeply appreciate the impact that you have on our success. And because of friends like you, OU has become a national pacesetter in American public higher education.

Through various events – such as watch parties, picnics, scholarship programs, guest speakers, community service, and numerous other fun activities; you continually demonstrate what is best about being a Sooner!

This document is a new initiative for us and we believe that it will help make us even more efficient and effective as we go forward. If you like it, please let us know. And if you feel that we can improve it, we'd love to know that too. Our continued commitment to serving the needs and desires of our alumni, and your commitment to our alma mater, are a combined effort!

Live On, University!

JP Audas ’87 & ’98
Associate Vice President, OU Alumni & Development
Starting an OU Alumni Club or Society

- Once intent to start a club is expressed, a Getting Started packet will be sent to the volunteer by alumni staff including the confidentiality agreement, club policies and suggested constitution
- Club manager orders a list of agreed-upon constituency from Alumni Records
- Confidentiality agreement is returned to OU Alumni Office — Electronic or fax submission is acceptable temporarily but we require original to be mailed to us
- With confidentiality agreement on file, the first communication piece is distributed from the Alumni office in Norman to alumni and friends
- Gauging interest through interest survey:
  - Email, postcard, letter
  - Announcing organizational meeting time/location
  - Email, letter, newsletter
- A completed constitution including the signatures of TEN OU ALUMNI (verified by our office) and leadership roster is required to HAVE ACCESS TO CONFIDENTIAL INFORMATION (i.e. Alumni contact information)
- A submission of constitution charter is declared and the club is official
- If you have any questions, don't hesitate to contact Andrew Wertz at 405-325-2787 or awertz@ou.edu

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 10 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 must be submitted in writing to the club manager and an updated leadership roster will be 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 confidentiality agreement 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:
  - Alumni Directory listings (Any officer with a confidentiality agreement)
  - Current student listings (Any officer with a confidentiality agreement)
  - Prospective Student Information (President or Scholarship/Recruitment officer)
  - Financial Information — Club account statements or any detailed records of the Club Foundation Accounts will only be released to the club president or club treasurer as indicated on the leadership roster at the Alumni Association.
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 accounts may only be used to provide OU students with scholarships.
- Deposits
  - 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.
  - 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.
  - 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 your club manager for more details on gifts in kind.
- 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 expenses when other officers are available.
  - An ORIGINAL RECEIPT and explanation of expense must accompany reimbursement requests.
- Gifts 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 your club manager for more details on gifts in kind.

Communications

- The Alumni Association is happy to produce a newsletter, at minimal cost to the club, to promote events, scholarship fundraising, etc.
- 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.

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 students, faculty and staff.
- 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 included 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 Bill Moakley, Director of Alumni Communications.
- Any use of these or other logos, word marks or verbiage included in the included logo 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://sooner sports.com/licensing/.
- If you have any questions about the use of the marks, please contact the Department of Trademark Licensing at (405) 325-7008, by email at oulicensing@ou.edu, or visit their website at http://sooner sports.com/licensing/.

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 automatically 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.
Alumni Association Club
Guide to Scholarships

- Each spring, clubs submit the scholarship request form detailing the name of the recipient and amount of each scholarship, as well as the signatures of all selection committee members. The request is for the upcoming fall and spring semesters. *These forms are due no later than July 1.*

- Note: Due to the requirements set forth by the Foundation, this form must be returned before any scholarships are awarded.

- The University of Oklahoma matches every scholarship in the form of a tuition waiver up to $2,500 a year ($1,250 each semester).

- The Alumni Association will submit all necessary documentation to Financial Aid to process the tuition waiver and to the OU Foundation to process the disbursement to each student’s Bursar account.

- Scholarships will be disbursed into Bursar accounts based on the disbursement date of the term, and after fulfilling any additional scholarships requirements, including enrollment. If scholarship funds remain after the bursar’s account has been paid, the Office of the Bursar will process checks directly to the students.

- Clubs determine scholarship amounts and recipients provided, the awards comply with the club’s fund agreement and every effort has been made to exclude any possible conflict of interest in the selection process. *No family member of any scholarship recipient or candidate should participate in the scholarship selection process.* Club fund agreements with the OU Foundation require that no donor to the fund receive benefit from it. Therefore it is important that *no parent of a student considered for a club scholarship award be a donor to the club’s fund.*

- 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 OU Alumni Association staff (your 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 portion of the award provided by the OU Alumni Club is deposited directly into the student's OU Bursar Account.

- Both club 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/club_resources/](http://www.ou.edu/content/dam/alumni/images/Clubs/club_resources/)
Identifying Students:

- The Freshman Scholarship Application Process is offered to the clubs/societies to help with the club scholarship selection process. With the help of OU’s Recruitment Services, the Alumni Association can provide your club with a list of students from your area who have been admitted to OU. The club can review that list and award scholarships that meet the criteria set forth by the club.

Scholarship Application:

- The Alumni Association has provided a scholarship application template. If the club chooses, they may use their own scholarship application. However, the club must at a minimum include the information requested in the template.
  - Please make sure the club’s specialized template has been approved by the Alumni Association and is on file in the OU Alumni Association. For approval please send your template to Jill Stephens at jills@ou.edu.

Confidentiality Agreement:

- The confidentiality agreement must be completed and faxed or emailed to the Alumni Association in order to use OU’s Freshman Scholarship Application for use in the scholarship selection process.
- Once the scholarship recipients have been chosen, the club is responsible for destroying or shredding all student information the club has received.
- For more information about this process please contact Jill Stephens at jills@ou.edu or (405) 325-2056.