Fall Forum for Chapters & Clubs
Friday, October 31, 2014
Chapter Finance & Scholarship Process Overview

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Steve Tomaiko, Business Manager
Trish Thiele-Keating, Alumni Engagement Strategist
Background on ASUAA Financial Procedures

- ASUAA is a separate 501c3
- Annual budget is partially supported by funding from the University
- Membership and Business Partnerships provide the majority of annual funding for all operations, programs & events
- Undergo an annual Audit each summer
  - Documentation is key!
Chapter Financial Processes

- Chapters & Clubs receive allocation of funds each fiscal year
  - Chapters receive Operating & Signature Program Funds
  - Clubs receive Operating Funds

- Allocations are based on the information provided by the Chapter or Club in the Annual Plan due June 1
  *New this year! Early bird bonus for submitting the Annual Plan by May 15 ($25)
Holding Funds

- Money the Chapter or Club brings in from events goes into Holding Funds at ASUAA
- Funds never expire
- Can be used anytime for chapter activities
- Utilize the Online Registration System for events for easy money processing
Utilizing Funds

• 2 ways to pay
  • Pay a vendor invoice in advance
  • Reimbursements after the event (itemized receipts required)

• 3 Items to submit
  • Itemized Invoice or Receipts (dates/amounts need to be readable)
  • Check/Reimbursement Request form
  • Program Report: if food was served, a list of attendees must be included

** Checks are cut once per week on Thursdays

ALL DOCUMENTS MUST BE SUBMITTED WITHIN 30 DAYS OF THE EVENT
Guidelines for Using Funds

• Most Notable
  • Allocated Funds can’t be used for alcohol
  • Allocated Funds can’t be used to purchase personal items for board members

Check the Online Toolkit for the Guidelines for Allocated Funds

Always feel free to ask questions!
Scholarships & Fundraising

Scholarships

• All ASU Scholarship funds are maintained by the ASU Foundation (we can assist with setting up the account)

• ASU Foundation can provide gift receipts for charitable contributions

Events with Donation Components

• ASU Foundation reviews all solicitation materials BEFORE they are made public – including Silent Auction materials

• Fair Market Value must be displayed for purchaser to see
Importance of Scholarships to ASU

• Resident tuition/fees/housing approx. $26K/year; non-resident approx. $36K/year

• Enrollment deposit now required-due May 1 each year; students committing to ASU earlier

• Merit-based scholarships are awarded weekly beginning in Sept/Oct; students start applying for aid as early as January 1st each year, due March 1st

• Disbursement of funds to student’s account occurs at beginning of August. Awards made to students after that date can alter a student’s financial aid package
Chapter Scholarship Programs

• Geographic and Special Interest Chapter Scholarships total nearly $360,000 in financial assistance for ASU students each year

• Fundraising for scholarships
  • Pennies for Points
  • Special Events: Golf Tournaments, Bowling Parties, Silent Auctions
New Process for 2015 Scholarships

• Transition all Chapter & Club scholarship applications to online form
  • Distribution of applications through a secure site will reduce risk of FERPA violations
• Applications can be made available in January
  • Chapters & Clubs can still determine application questions & criteria
• Selection of awardees should be completed by June 1
• Continue to recognize scholars at summer Send-Offs
• Funds are transferred to student’s account before classes begin in Fall
Leveraging Resources and Strengthening Impact

Matt Hodson, Digital Media Manager
Trish Thiele-Keating, Alumni Engagement Strategist
Jennifer Haye, Program Coordinator
Importance on Alumni Chapters & Clubs

• **Alumni Network** – Allows us to unite alumni who are physically thousands of miles away from the university and keep them connected to their alma mater.

• Reflect the look, feel and spirit of ASU & ASUAA

• Bring alumni together with fun & friendly, accessible and diverse events and programs

• Provide a point of contact for alumni and source of information about ASU & ASUAA for alumni, parents, students and future students
It has to be a group effort.

- Game Watchings
- Board Meetings
- Send-Offs
- Social Media Updates
- Check Requests
- Pac-12 Collaborations
- Booking Venues
- E-Newsletters
- Magazine Submissions
Tips for keeping group leadership organized and efficient

• Have clear expectations with job responsibilities
• Keep each other accountable
• Evaluate your effectiveness
• Be welcoming and inviting to new participants
  • Follow-up with new attendees after events
• Have a leadership succession plan in place
  • Recognize when it is appropriate to scale back
Keeping expectations realistic

• Do you meet too often?
• Is there a lot of talking but not enough action taking place?
  • Delegate specific tasks and establish a timeframe for response
• Set goals as a group
  • Fundraising
  • Attendance
• Don’t plan beyond the time and resources your have available.
HAVE FUN!

• Be courteous & respectful to each other.
• Have flexibility for when other commitments come up.
  • Speak up if your commitment to the group needs to change.
• This is not your full-time job.
• Celebrate the successes – small & large.
Resources available for Chapters & Clubs

Communication & Marketing
• ASUAA Website – Chapter & Club Pages
• Online Toolkit – frequently used forms and documents
• Option for Weekly Email Request
• Event Registration & Calendar Save the Dates
• Monthly ASUAA E-news
• Chapter Chat – Monthly e-news for Chapter & Club leaders
• ASU Magazine – quarterly publication with Chapter Network Section
• Surveys
• Social Media
Impact of the ASU Alumni Chapter & Club Network

• 31 ASU Cares Projects across the US
• 32 Pat’s Run Shadow Runs with 2,629 participants raising $57,117 for Pat Tillman Foundation
• 200+ game watchings annually and $3000+ raised in Pennies for Points
• $340,000 in scholarships awarded to more than 60 students from around the country
• 38 Sun Devil Send-Offs welcoming 350 new students and their families to the ASU Family
• 10,000+ volunteer hours supporting the University & ASUAA*
Events!
Share & Tell
Event Sharing Round-Up

- Sun Devil Send-Off
- Pat’s Run Shadow Run
- ASU Cares Project
- Signature Event
- Game Watching or Sports-Related Event
- An event you’d like to do
Tips for Successful Events

Planning in Advance = Good Idea

• Make a budget
• Delegate tasks
• Work Backwards
  • Invites & Announcements should go out at least 4-6 weeks prior to the event if money is involved
• Use the Online Toolkit
• Save The Dates
• Share Calendars of Upcoming Events as early as possible
• Partner with other Groups & Existing Events
Spread the Word Early & Often

- Chapter E-Newsletters
- ASUAA Monthly E-Newsletter
- Save the Date in the *ASU Magazine*
- Website
- Social Media
- Chapter Rosters – Mailings & Phone Calls
- Fliers at your current events
- Follow-up e-mails to past attendees
Be Money $mart

- Use allocation from ASUAA to make money for Holding Funds
- Secure Group Pricing for Events
- Have Tiered Pricing for Members
- Plan payments to vendors accordingly
- Fundraisers for Scholarships – Plan far in advance
At the Event

• Be Prepared
  • Sign-in sheet, name tags, banner, giveaways, membership forms, etc.

• Have a positive attitude

• **TAKE PHOTOS!!!**
Post-Event

• Follow-up with your attendees
  • Say THANK YOU!

• Send a recap & photos to ASUAA
  • Website, Magazine & E-newsletters

• Take care of payments & reimbursements right away
  • Itemized Receipts
  • Request Form
  • Program Report
Pat’s Run Shadow Runs
Planning for 2015
2014 Shadow Runs

Record Breaking!
32 Pat’s Run Shadow Runs
2,629 participants
$57,117 for Pat Tillman Foundation
Feedback

• What participants liked best:
  • Supporting the cause
  • Beautiful courses
  • Friendly people
  • The food at the end

• Where improvements can be made:
  • Mailing shirts earlier
  • Better communication before race day
  • Obvious check-in area & organized process
  • More signage along the course
  • Setting clearer expectations for participants*
Planning for 2015

• The Date: Saturday, April 25, 2015
  • All Shadow Runs should take place on or before this date

• 1st Communication from PTF: Next Tuesday, Nov. 5
• Confirm Chapter/Club Shadow Run Participation: Dec. 1
• Registration Opens: Monday, January 5
Registration Process

• PTF has changed to new registration portal through Eventbrite
  • Shadow Run registration will be managed through this site as well
• Online Registration will be open Jan. 5 – April 8
• T-shirts will be shipped by April 13 at the latest
• Instruction will be given for on-site registrations
  • All Walk-up registrations & money must be turned in to ASUAA by May 4, no later.
Resources for Captains

• PTF will provide a Dropbox account
  • Captain Handbook
  • Marketing Kit with Approved Logos, banners, photos
  • Expense/Revenue coding forms
  • Walk-up registration form

• Conference Call for Captains in February
• Promotion of Shadow Runs through PTF Marketing
• ASUAA Communication Resources
Sparky’s Membership Mania
Celebrating 2013-2014!
Promoting ASUAA Membership

Key to our Success!

• Membership is important to Chapters & Clubs because it provides funding to support your programming
• Provide Benefits to Current Members as well as Future Members
  • Discounts for events
  • Giveaways
  • Frequent Thanks
Promoting ASUAA Membership
*Sparky’s Membership Mania!*

**Competition Rules**

- Minimums required in order to qualify for award recognition & funding percentage:
  - Chapters need a minimum of 10 memberships
  - Clubs need a minimum of 5 memberships

- **25%** of each membership will be awarded back to Chapter/Club once the minimum is met
- Competition Ends June 30, 2015
Promoting ASUAA Membership

*Sparky’s Membership Mania!*

• 2013-2014 groups brought in 195 members
Divisional Awards

*Sparky’s Superstars
Sparky’s Membership Mania
2014 Divisional Excellence Awards

*Recipients per division are determined by number of memberships recruited, based on minimum requirement to participate
*Cash award of $50 to be utilized for chapter activities
*Chapter recognition plaque
* Maximum of one recognition per chapter
Sparky’s Superstars
“A” Mountaineers (West Coast)

Los Angeles
Sparky’s Superstars
Lantern Walkers (East Coast)

National Capital
Top Devil

*Top Devil

Sparky’s Membership Mania

2013-2014 Excellence Award

Recipient is determined by highest number of memberships recruited.

Cash award of $500 to be utilized for chapter activities.

Name on Multi-year Top Devil plaque hung in Old Main.

* Maximum of one recognition per chapter
TOP DEVIL

CHICAGO
Wrap-up & Reminders

Save the Date!

• Next CAC Call – January 26, 2015
• Plan your ASU Cares project for March
  • Spring Leadership Conference: March 27-28;
  Pat’s Run Shadow Runs: April 25, 2015