

## POLICIES AND PROCEDURES GOVERNING CHARTERED ALUMNI CHAPTERS

The chartering process for alumni chapters grants recognition by the Alumni Association Board of Directors entitling the group to official CSUN status, use of the University name and campus facilities, membership dues allocation, and eligibility for other services and recognitions approved by the CSUN Alumni Association. Charters and activities are reviewed regularly for congruence with the mission of the University and the mission of the California State University, Northridge Alumni Association. All alumni chapters operate under the umbrella of CSUN Alumni Association.

### **Mission of the California State University, Northridge Alumni Association**

The mission of the California State University, Northridge Alumni Association is to foster positive alumni relationships with each other and with the University in order to support the mission of the University and enhance the well-being of alumni.

The goals and objectives of the CSUN Alumni Association are to develop and sustain interaction with alumni, students, faculty, staff, and the community, thereby enhancing a sense of tradition, affiliation and pride in support of the mission of the institution.

### **Mission and Values of California State University, Northridge**

California State University, Northridge exists to help students realize their educational goals. The University's first priority is to promote the welfare and intellectual progress of students.

**COMMITMENT TO TEACHING, SCHOLARSHIP, AND ACTIVE LEARNING.** We demonstrate excellence in teaching. We honor and reward high performance in learning, teaching, scholarship, research, service, and creative activity. Because the quality of our academic programs is central to our mission, we encourage intellectual curiosity and protect the multiple expressions of academic freedom.

**COMMITMENT TO EXCELLENCE.** We set the highest standards for ourselves in all of our actions and activities and support the professional development of faculty, staff and administrators. We assess our performance so that every area of University life will be improved and renewed. We recognize and reward our efforts of greatest distinction and through them provide state and national leadership.

**ALLIANCES WITH THE COMMUNITY.** We seek partnerships with local schools, community colleges, businesses and government and social agencies to advance the educational, intellectual artistic, cultural, and economic aspirations of our surrounding communities.

**RESPECT FOR ALL PEOPLE.** We aspire to behave as an inclusive, cooperative community. Our behaviors, policies, and programs affirm the worth and personal dignity of every member of the University community and contribute to a campus climate of civility, collegiality, tolerance, reasoned debate.

**ENCOURAGEMENT OF INNOVATION, EXPERIMENTATION, & CREATIVITY.** We seek to provide an environment conducive to innovation, experimentation, and creativity. We encourage all members of our community to take intellectual and creative risks and to embrace changes that will enhance the fulfillment of the University's Mission.

To support and enhance the growth and development of alumni constituencies the Alumni Association provides a host of privileges to chartered chapters. In exchange for these privileges, minimum standards are required to be upheld by all chartered organizations. These privileges and responsibilities are outlined below:

## 1. RECOGNITION AND CONDUCT

### Use of the University Name and Other Alumni Names and Marks

- a. **Name** - The California State University, Northridge Alumni Association is the official representative body of the alumni of the University. The name "Alumni Association/Chapter/Network" and other similar derivatives are for the exclusive use of this body. Only officially recognized chapters may use these names.
- b. **Logo** – CSUN has developed official chapter logos/marks designated for each chartered chapter which can be found at: [CSUN Alumni Chapter Logos](#) . Only officially recognized chapters may use these logos/marks. Chapters may not create or use additional logos or marks.
- c. **Standards** - Chapters must follow all University Graphic and Identity Standards pertaining to the use of CSUN names/marks when communicating on behalf of a chapter. The guidelines can be found at: <http://www.csun.edu/identity>.

### Representation at the CSUN Alumni Association Board of Directors meetings

- a. One representative identified by each chapter shall serve as a full voting member on the Alumni Association Board of Directors. The chapter president shall be automatically designated as the official member unless the chapter presents an alternative representative and contact information.
- b. The bi-annual Alumni Association Board of Directors meetings typically attended by chapter representatives are generally scheduled in December and June of each year.
- c. Annually, each Chapter President, will be provided one CSUN Courtesy Parking Permit which can be used to park in all student or faculty parking lots on campus. The permit is non-transferable and all parking signage and polices must be followed or the courtesy permit will be withdrawn.

### Conduct

- a. Chartered chapters and their members represent the University and the Alumni Association, and have a responsibility to conduct themselves in such a manner as to display a positive impression of California State University, Northridge to the public, students, and fellow graduates. Chapters are expected to fulfill the purpose stated in their chapter constitution. Chapter policies and procedures shall be consistent with those of the University and Alumni Association.
- b. Chapters shall self-govern with minimum oversight from the Association as long as they abide by the organizational and program standards outlined in these policies and procedures, their chapter bylaws and the CSUN Alumni Association Bylaws.

## 2. LEADERSHIP STRUCTURE AND MEETINGS

### Chapter Leadership

- a. Each chapter must have at minimum – an alumni president, two alumni board members and a faculty/staff liaison active on their leadership team roster to be recognized as an active chapter.
  - i. Chapters that do not keep an active leadership roster may be placed on a one-year probation.
  - ii. Chapters are encouraged to create additional leadership positions and identify additional volunteers to fulfil the mission and stated goals of the chapter.
- b. Chapters shall submit to the Office of Alumni Relations an official list of current officers, volunteers, and advisors at the beginning of each fall semester, and at other times when necessary. If roster changes occur mid-year, it is the responsibility of the chapter to update the Office of Alumni Relations. Official chapter contact information will be drawn from these lists for use in publications, insurance, and other communications.
- c. All chapter board members and officers must be current dues-paying members of the Alumni Association.
- d. Chapter board members and officers will be afforded coverage under the standard university insurance and liability package for volunteers.

### Chapter Meetings

- a. Chapters must convene at least two leadership meetings per year. Meetings may be convened in-person, phone, web or other form of general business technology.
- b. Chapters shall notify the Office of Alumni Relations of the agenda and scheduling of all meetings.
- c. All chapter meetings must be open to the public and follow California State meeting laws pertaining to the agenda, scheduling, and minutes.
- d. Hosted/complimentary CSUN guest parking passes may be requested for chapter leadership and volunteers attending official chapter business meetings held on campus. Requests shall be submitted at least two business days in advance of the meeting.

## 3. PROGRAMMING AND EVENTS

### Events and Activities

- a. Chapters are expected to host a minimum of two events, promote Alumni Association events or otherwise *engage their constituency* in the stated purpose of the chapter constitution on an annual basis.
- b. The types of events or methods of engagement can vary depending upon the chapter mission, goals, volunteer commitment and available finances in any given year.
- c. Chapters that do not host at least two annual events or engage their constituency in alternative ways may be placed on probation.

## Calendars

- a. Chapters shall submit a calendar of anticipated events, meetings and activities for approval prior to the start of each fall and spring semesters.
- b. New or additional events and activities can be added to the master calendar throughout the year with 3 months prior advance notice from event date.
  - i. Events can be calendared with the Alumni Office via the online event submission form available on the alumni website.
  - ii. Events submitted with insufficient lead time to plan, promote and execute effectively will be denied and/or postponed.

## Budgets

- a. An *Event Budget Form* must be received by the Office of Alumni Relations three months prior to the activity date for any chapter program with a budget exceeding \$500.
- b. A budget shall include all expected revenues (e.g. ticket sales, admission fees, sponsorships, etc.) and estimated event related costs (e.g. AV and facility rentals, food and beverages, awards, travel, musicians, supplies, decorations, gifts, hosted parking, etc.).
- c. The *Event Budget Form* is available on the alumni website.

## Contracts

- a. Chapter volunteers may coordinate with vendors to arrange and specify dates, times, attendance and food minimums, and other services etc. However, chapter volunteers, including the chapter president, may not sign any contractual agreement to purchase goods, secure facilities or services on behalf of the chapter. This includes both on-campus or off-campus vendors and services.
- b. Chapter event leads should request all contracts to be addressed to the CSUN Foundation and forwarded to the Office of Alumni Relations for final review and formal signature by the CSUN Foundation.
- c. Direct vendors to prepared contracts using the following name and address as the formal “contractor”, instead of the Chapter name:  
Attention: Ira Unterman  
CSUN Foundation  
18111 Nordhoff Street, Northridge CA 91330-8296

## Event Insurance

- a. Standard chapter meetings, programs and activities are covered under the university event and liability insurance coverage at no cost to the chapter.
- b. If deemed necessary by the Office of Alumni Relations, the cost of high risk event insurance for single events may be passed on to the chapter on an event-by-event basis depending on the nature of the event and cost of the additional coverage.
- c. It is important to list all chapter meetings, programs and events on the Alumni Association Master Calendar for insurance assessment by the Office of Alumni Relations.

## Attendance

- a. Alumni and constituents do not need to be dues paying members to participate in chapter events and activities. Chapters may charge tiered admission pricing for non-members if desired.

## CSUN Campus Parking

- a. A limited number of hosted CSUN guest parking passes can be made available for VIP guests attending on-campus chapter events (e.g. Guest speakers and volunteer mentors). Requests shall be submitted at least two business days in advance of the meeting.

## 4. COMMUNICATIONS AND EVENT PUBLICITY

- a. All chapters are expected to comply with the CSUN Identity guidelines which offer a messaging platform and consistent graphic standards for the university across a variety of print and media communication channels. These guidelines can be found online at <https://www.csun.edu/identity>.
- b. The design and copy of all chapter communications distributed in mass MUST be approved by the Office of Alumni Relations prior to distribution. Templates are available in the Office of Alumni Relations for print and digital communications to aid chapters in developing messaging and format.
- c. Communications with alumni constituents must be non-profit in nature, not commercial or for specific chapter member's personal ventures.

## Websites

- a. Each chartered chapter will be provided a chapter page on the general Alumni Association website to communicate chapter goals, upcoming events, leadership rosters and other information determined by the chapter leadership.
- b. CSUN will administer and manage a separate online platform to accept payment of chapter membership fees, event registrations, donations and other online payment needs.
- c. Chapters may not create their own chapter website outside of the official CSUN platform.

## Broadcast Email

- a. CSUN will administer and manage a broadcast email communication platform to send email messages on behalf of chapters to their constituents.
- b. Chapters may not send mass emails to groups over 100 constituents outside of this platform.
- c. "Copy/Text" and suggested graphic images or design features for any email communication should be provided to the Office of Alumni Relations 3 months prior to the event date to allocate sufficient time to design the communication and promote your event/initiative.

## Social Media

- a. The Alumni Association holds accounts on Facebook, Twitter, Instagram, Snapchat and LinkedIn social platforms and will automatically post information promoting chapter events or programs listed on the Master Calendar as relevant to each channel.

- b. Upon request and with approval from the Office of Alumni Relations, chapters may open additional accounts specific to individual chapters on these or other social media platforms or channels. A staff member in the Office of Alumni Relations must also be granted administrative rights and updated log-in access to all chapter social media channels.
- c. When setting up social media accounts, chapters shall only use their CSUN approved chapter work-mark/logo for the masthead/main image. Please contact the Office of Alumni Relations if different image layouts or configurations are necessary.
- d. Chapter volunteers managing social media channels must comply with the CSUN Identity and communication guidelines pertaining to Social Media which can be found online at <https://www.csun.edu/identity/social-media>.

## Mail/Snail Mail

- a. Unless otherwise approved, all mail will be prepared and sent via the CSUN Mailroom. Constituent address data will be prepared by University Advancement and processed directly through the CSUN Mailroom for distribution. Printing and postage fees will be charged to the chapters' account unless otherwise discussed/approved by the Office of Alumni Relations.
- b. Event invitations/flyers/postcards need to be prepared a minimum of 8 weeks prior to an event to allow for delivery under the non-profit rate as applicable.
- c. Rosters and constituent contact information received for review and/or use should be treated as confidential in nature and can only be used for the intended purpose and approved chapter related business.

## CSUN Magazine

- a. The Office of Alumni Relations is afforded visibility in the CSUN magazine and other university publications and will make every effort to promote chapter events and initiatives as space is available. Submissions can be sent to the Office of Alumni Relations at any time.

## 5. MEMBERSHIP

### Membership Dues Revenue

- a. A portion of the Alumni Association annual dues revenue for members who have officially identified a chapter affiliation at the time of acquisition will deposit into Chapter accounts at the beginning of each Fiscal year. Calculation will be based on last year's total chapter membership numbers.
- b. Membership packages and pricing levels are set by the Alumni Association Board of Directors. Chapters may not discount the cost of membership dues without prior approval.
- c. Chapters may not collect additional membership dues above those collected by the Alumni Association. However, they may raise funds for scholarships and special projects as long as the amounts are not connected to the basic member dues, acquisition or renewal package.

- d. Dues revenue will be allotted to chapter accounts at the following rates per membership package:

Package	Fee	Chapter Allotment
Annual Single Member:	\$40 per person	\$10 per member
Annual Joint Member:	\$50 total	\$10 pp (\$20) total
Faculty/Staff Annual:	\$20 per person	\$10 per member
Recent Graduate Member:	\$20 per person	\$10 per member
Three Year Member:	\$90 per person	\$10 per member
Single Life Member:	\$500 per person	\$10 per member (first year only)
Joint Life Member:	\$600 per person	\$10 pp (\$20) total (first year only)

Life membership revenues are placed in an endowment fund overseen by the Alumni Association to support scholarships and operations.

### Cards, Benefits and Services

- a. A member of a chartered chapter must be an active dues paying member of the CSUN Alumni Association to receive the benefits of active membership status of the Association.
- b. Dues-paying members will receive a membership card and information listing general benefits and services afforded to all Alumni Association members. These will be prepared by the Office of Alumni Relations and mailed to chapter members at Association expense.
- c. Alumni and constituents do not need to be dues paying members to participate in chapter events and activities. Chapters may charge tiered admission pricing for non-members if desired.
- d. Additional membership benefit information can be found online at: <https://www.csun.edu/alumni/memberbenefits>

### Member Renewal and Acquisition

- a. The Office of Alumni Relations will work with the chapter leadership to annually develop a marketing strategy to acquire new members on behalf of all alumni chapters that includes print and social media.
- b. The Office of Alumni Relations will automatically send printed and electronic renewal reminder notices to lapsing chapter members in the month(s) prior to and after the member's expiration date.

### Member Rosters and Lists

- a. The Office of Alumni Relations will maintain the official alumni records, rosters, and database on behalf of the chapters.
- b. Monthly, the Chapter President will receive a list of all new chapter members and a list of all lapsed chapter members from the prior month.
- c. Chapters may request additional membership reports or lists at any time with 4 business days' notice.
- d. Rosters and constituent contact information received should be treated as confidential in nature and can only be used for the intended purpose and approved chapter related business.

## Minimum Membership Requirements for Recognition

- a. Following the first year of charter, chapters shall maintain a minimum of 25 active dues paying members to remain chartered and receive benefits afforded to chapters. One of these members must be recognized as the official Chapter President along with 2 board members.

## 6. FINANCES

### Chapter Bank Accounts

- a. On behalf of the Chapter, the Alumni Association will establish an official Chapter accounts with the CSUN Foundation. All chapter related financial transactions (expenditures, checks, revenues, donations, etc.) must flow through an on-campus CSUN Foundation Account.
- b. Chapters may not hold any off-campus bank accounts, checking accounts or other financial services.
- c. Chapter financial reports will be distributed monthly to each Chapter President. Additional reports may be requested at any time with 5 working days' notice.

### Credit Card and Cash Management

- a. Upon request and with 4 business days' notice, the Office of Alumni Relations can provide a change box and/or credit card terminal to facilitate the collection of admission fees, memberships or donations in the form of cash, check or credit card transactions at chapter events and programs.
- b. All cash, checks received and/or the credit card processing terminal must be returned to the Office of Alumni Relations the next business day following the event. The Event Lead or designee is responsible to account for the funds allocated, track receipts and return funds for deposit.

### Fund Use and Approvals

- a. Chapters may direct the use of chapter funds for purposes deemed appropriate by each chapter board, in congruence with the chapter mission and with guidance from the Office of Alumni Relations.
- b. All chapter expenditures and financial transactions must follow CSUN Foundation and University financial policies, hospitality policy and signing authorities.
- c. Original and itemized receipts must be submitted when requesting reimbursement of expenses.
- d. Gratuity for services and tips CANNOT exceed 15% on any transaction.
- e. 10 day prior written approval by the Office of Alumni Relations is required on any request for reimbursement over \$500.
- f. To process the following types of expenses, a check or payment in the name of the company/individual must be disbursed directly from the CSUN Foundation to the service provider as additional tax information is generally needed. Chapter members CANNOT submit receipts and request reimbursement for the following types of expenses:
  - i. Performers/musicians/contractual services
  - ii. Guest speakers/panelists fees or honorariums
  - iii. Travel (hospitality, plane, gas, food, etc.) on behalf of a guest speaker



- g. Chapters CANNOT use Chapter funds in the following ways:
  - i. Gifts/flowers for faculty/staff/alumni/students for congratulatory purposes or who are retiring, ill and/or passed away CANNOT be purchased with chapter funds. The Alumni Association has a designated general account for these types of recognition expenditures from which the chapter may make a request.
  - ii. Gift Cards CANNOT be purchased/reimbursed using Chapter or University Funds. The State of California considers gift cards in the same category as cash. (Gift cards may be donated.)
  - iii. Chapter board members CANNOT purchase alcohol for events/meetings without prior written approval from the Office of Alumni Relations.

## Accounting Fees

- a. The Alumni Association will pay all fees and charges associated with accounting, audit, and financial services provided for chapter accounts held with CSUN and the CSUN Foundation.

## Collection of Additional Chapter Dues

- a. Chapters may not collect additional membership dues above those collected by the Association, however, they may raise funds for scholarships and special projects as long as the amounts are not connected to the basic member dues, acquisition or renewal package.

## Collection of Additional Chapter Revenue

- a. Chapters may raise additional revenue, outside of their allocated membership dues, to support chapter events, initiatives and scholarships. These revenues are generally raised via ticket sales, program fees and philanthropic gifts and solicitations.
- b. All additional revenue collected must be deposited into CSUN Foundation.
- c. Chapters may approach individuals or corporate partners for sponsorship or financial support of chapter initiatives. Ask amounts over \$500 must be cleared first through the Office of Alumni Relations to insure coordination with other current or potential university solicitations or proposals.
- d. Any written solicitation letters, proposals or communications at any dollar amount must be reviewed by the Office of Alumni Relations prior to distribution.

## Contributions/Donations to Chapters

- a. All philanthropic donations and gifts received by a chapter shall be deposited and receipted by the CSUN Foundation.
- b. Checks can be made payable to either the CSUN Foundation or the Official name of the Chapter. For checks made payable to the CSUN Foundation, include a notation in the memo designating the specific chapter or intended purpose.
- c. Contributions to chapters can also be made online [www.csun.edu/give](http://www.csun.edu/give). Donors should be instructed to include the name of the chapter in the special instructions memo so funds can be deposited to the designated chapters' account.
- d. Chapters may receive gifts-in-kind of goods or services with approval from the CSUN Foundation.

- e. Upon receipt of the contribution, the Chapter must also collect the name and address of the donor so that the CSUN Foundation can provide the donor with their official receipt of donation for tax purposes.

## Raffles and Silent Auctions

- a. Chapters who wish to include a raffle or silent auction as part of an event must request prior permission 30 days in advance of the planned activity from the Office of Alumni Relations as specific IRS and California State guidelines apply in the receipt and management of funds related to gaming activities.
- b. Consult with the Office of Alumni Relations if your chapter plans to include door prizes, opportunity drawing or similar as part of your program or event to ensure the proper protocols are in place.

## Additional Funding Requests

- a. The Office of Alumni Relations has set aside a special fund to assist chapters in supplementing the costs of events and initiatives outside of their current chapter budget.
- b. These funds are primarily used to support new and/or struggling Chapters until they become self-sufficient.
- c. Chapters may request additional financial support by submitting the *Supplemental Funding Form* available on the Alumni website.

## 7. SCHOLARSHIPS

- a. Chapters can use chapter operational funds raised through event fees, membership dues, program income or philanthropic donations to provide scholarships to CSUN students.
- b. Chapters shall prepare written guidelines to define the name of the scholarship, amount of the scholarship, the student application/eligibility criteria and selection committee, criteria and guidelines. Samples are available in the Office of Alumni Relations.
- c. All scholarship criteria and guidelines shall follow Federal, State and CSUN policies.
- d. All chapter scholarship checks shall be disbursed to students and administered through the CSUN Office of Financial Aid and Scholarships and the CSUN Foundation.
- e. All chapter scholarships must be listed on the CSUN Financial Aid & Scholarship department website using Academic Works software. Students must apply ONLINE through the CSUN Office of Financial Aid and Scholarship online software portal.
- f. Chapter scholarships can ONLY be awarded to current/returning CSUN students. Students who are graduating and DO NOT plan on returning in an academic capacity in the term the funds are received, are NOT ELIGIBLE to receive a scholarship.
- g. The University has rules and minimum gift levels pertaining to scholarships and endowments named after individuals or organizations. If the chapter wishes to name a scholarship using other than the formal alumni chapter name, Please contact the Office of Alumni Relations for assistance.

## 8. DISSOLUTION OF CHAPTER RECOGNITION

- a. If a chapter does not comply with the principles stated or inferred within these guidelines, the chapter will be placed on probation for the period of one year with written notice requiring the chapter to comply within a reasonable time period or have its recognition withdrawn.
- b. In the event a chapter fails to comply within the time period specified, the Office of Alumni Relations shall submit a recommendation to the Alumni Association Board of Directors to withdraw recognition. Withdrawal of recognition will be voted upon by the Alumni Association Board of Directors.
- c. Upon withdrawal of recognition, all assets of the chapter shall be transferred to the CSUN Alumni Association.
- d. Once official recognition has been withdrawn, the chapter may no longer use the University name, facilities, finances, equipment or support staff. Should the group fail to cease these activities, legal action may be necessary.

Approved 10/5/01  
Revised 7/16/15  
Revised 3/7/18

Addendum Documents:

<https://mycsun.box.com/s/vkc0fy4seuafjk90389qi15ssepmlbk7>

---

Signature of Board Member

Date

---

Print Name

Name of Chapter