Chapter Incentive Program Guidelines
Launch Date: 11/1/13

Easy online access to these guidelines and other resource materials available here:
www.alumni.utah.edu/incentive.

Program Overview
This incentive program is a partnership with chapters to promote and support membership in the Alumni Association. Financial guarantees from credit card and other affinity partner programs have diminished significantly in recent years. More than ever before, the Association is relying on annual and lifetime membership revenue to subsidize chapter outreach, scholarships, community service, legislative advocacy and Continuum magazine.

Chapters receive 50 percent of every U Alumni Association membership recruited in their area. Both new and renewing memberships apply.

<table>
<thead>
<tr>
<th>Membership Type</th>
<th>Incentive (50% per membership)</th>
</tr>
</thead>
<tbody>
<tr>
<td>One-Year Individual ($50)</td>
<td>$25</td>
</tr>
<tr>
<td>One-Year Joint ($65)</td>
<td>$32.50</td>
</tr>
<tr>
<td>Three-Year Individual ($135)</td>
<td>$67.50</td>
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<tr>
<td>Three-Year Joint ($165)</td>
<td>$82.50</td>
</tr>
<tr>
<td>Individual Life ($640)</td>
<td>$320</td>
</tr>
<tr>
<td>Four-Year Payment Plan Option ($170/year)</td>
<td>If four-year payment: $85/year</td>
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<tr>
<td>Joint Life ($825)</td>
<td>$412.50</td>
</tr>
<tr>
<td>Four-Year Payment Plan Option ($215/year)</td>
<td>If four-year payment: $107.50/year</td>
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<tr>
<td>Emeritus Individual Life ($365)</td>
<td>$182.50</td>
</tr>
<tr>
<td>Age 65+/Graduated 40+ years ago</td>
<td></td>
</tr>
<tr>
<td>Emeritus Joint Life ($510)</td>
<td>$255</td>
</tr>
<tr>
<td>Age 65+/Graduated 40+ years ago</td>
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</tbody>
</table>

Qualification for Participation
Effective November 1, 2013: In lieu of collecting chapter membership dues, chapters agree to promote membership in the U Alumni Association only. Chapters collect 50 percent of every Association membership they recruit (new and renewing) to support their events and activities.

Membership Drives
Membership Drives will be scheduled twice a year for a two-month period:

- Spring Drive: February 1 – March 31
- Fall Drive: September 1 – October 31
Registering Members
To ensure your chapter receives credit for the memberships it is responsible for recruiting, please do the following:

1. **Online Membership Form (www.alumni.utah.edu/membership)**
The online membership form has a designated section for “Support Your Local Chapter.” By selecting a specified chapter in the drop-down box, financial credit will be applied accordingly to the specified chapter.

2. **Paper Membership Form**
The U Alumni Association will provide chapters with a paper application form to use at events and during Membership Drives. The “Support Your Local Chapter” section must be completed for financial credit to be applied to the specified chapter. Immediately following events/drives, please mail completed forms to:

   Attn: Membership  
   University of Utah Alumni Association  
   155 S. Central Campus Dr.  
   Salt Lake City, UT 84112-0520

Financial credit is not retroactive. If a chapter has not been specified during the initial submission of the membership, it will not be attributed to the chapter. Financial credit cannot be assigned to a membership once it has been processed.

Collaborative Recruitment Efforts with U Alumni Association
Local membership recruitment efforts by the chapters will be supported by a variety of recruitment and renewal campaigns being administered by the U Alumni Association throughout the fiscal year – including direct mail, email and telephone campaigns. When the Association is conducting out-of-state recruitment and renewal campaigns, included in the message/offer will be the option to designate a portion of the membership to support a specific chapter in their area.

The U Alumni Association is available as a resource to help chapter leaders organize events that will attract new members – targeted marketing/messaging, selecting interesting guest speakers, etc. Additionally, the Association will work with chapter leaders to identify local member benefits.

Processing, Fulfillment and Renewal Notifications
The Alumni Association will handle the processing, receipt and fulfillment of all memberships. This includes providing every new and renewing member with an official membership card and list of member benefits. The Association will also handle the annual renewal notification process. This allows the chapters to focus solely on
encouraging people to join/renew, by directing them to the Association’s website or completing the paper form.

**Goals and Additional Scholarship Incentive**
Chapters that recruit 30 members (new and renewing) by June 30 each year will qualify for an additional $1,000 scholarship incentive to support students in their area.

**Distribution and Use of Funds**
The Alumni Association will provide chapters with payment for the portion of membership funds allocated to their respective areas on a semi-annual basis – in July and January for the previous six-month period. Deadlines for memberships are: June 30 and December 31.

**Reporting**
The Alumni Association will publish a semi-annual report tracking the number of memberships recruited by each chapter. This report will be reviewed by the Outreach Team. All chapter presidents will receive a copy.

**Evaluation of the Program**
The success of the program will be evaluated at the end of each fiscal year. A final report will be sent to all chapter presidents. Changes and adjustments may be made to this agreement at the end of the fiscal year.