Alumni Chapter Chartering/Reactivation

• **Objective**
  - Document key steps required for chartering and reactivating an alumni chapter

• **Background**
  - Essential chapter information is currently disseminated across a few alumni documents
  - Consolidated documentation for alumni members to access in one visible location on alumni website was warranted

• **Three Main Facets Required**
  - Federal Tax Exemption
  - Core Group
  - Bylaws
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• Establishing Federal Tax Exemption
  o Filing of Form 1023 is essential to apply for recognition of exemption from federal income tax under Section 501(c)(3)
  o All chapters must acquire tax exempt status within 60 days of being chartered
    □ Must maintain until tax exempt status is dissolved via Internal Revenue Service
  o Copies of tax exemption declaration for each chapter must be mailed to Treasurer of SUAF within 30 days of receipt by local chapter

• Forming Core Group
  o A minimum of five financially active people (regular, life, or subscribing life) is required for establishing chapter
    □ Interest in taking leadership roles in the organizational efforts is necessary
  o Two minimal essential positions (presiding officer & secretary) are mandatory for conducting business per Robert’s Rules of Order
  o Inform Office of Alumni Affairs of desired interest in forming alumni chapter
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• Producing Set of Bylaws
  o Alignment with Federation bylaws is necessary at a minimum
    o Chapter bylaws template that comports with SUAF Bylaws has been created for usage
    o Alumni Chapters may add provisions to accommodate chapter-specific needs, programs, and plans

• Endorsements
  o Approval of Executive Council is required for new chapter establishment
  o Chapters may be formed in any convenient geographical area
    o Boundaries established by agreement among Federation, chapter organizers, and any SUAF chapter already in existence that may be affected
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• Guidance Resources Available via Alumni Website
  - Federation Financial Policy and Procedures Manual
  - SUAF Bylaws
  - Chapter Leaders Handbook