

# MANUAL OF OPERATIONAL PROCEDURES



BETHUNE-COOKMAN UNIVERSITY  
NATIONAL ALUMNI ASSOCIATION

DAYTONA BEACH, FLORIDA  
REVISED, JUNE 2014

# PREFACE

PARADIGM: (1) A pattern or model; (2) A set of rules and regulations that establish boundaries

As we embark upon the task of establishing this manual of operation, it is important we, as an institution, examine our set of paradigms.

We must remember this is all new; therefore, we anticipate change and history shows us that people always resist change.

Now that we know that, what prevents us from seeing, accepting and understanding new ideas? The answer is simple – paradigms act as filters to screen information or data. They filter incoming experiences and blinds one to new opportunities. Rather than change, we look for data to fit our own paradigms, which is a creative solution to difficult problems.

If we continue to make decisions based on limited paradigms, we will continue to think (1) cheap gas will be forever, (2) four children make an ideal family, (3) Japanese products will always be junk, and (4) Cable T.V. will never catch on.

Paradigm has the power to keep us from seeing what is really happening. Every time you run into something beyond the boundaries of our paradigm, you won't see it and you won't master the data.

**EXAMPLES:** Japan has created an epidemic of quality worldwide. During the '60s, when you saw "made in Japan", you probably made judgment thoughts like (1) junk, (2) cheap, (3) copies, (4) poor quality, (5) toys, (6) imitations, and (7) low tech. But in 1990, when you see "made in Japan", we think (1) excellent quality, (2) high tech, (3) expensive, (4) leadership, (5) balance of payment and (6) innovations. Notice the contrasts? There was a change of paradigm in Japan.

We must develop an openness to new ideas; a willingness to explore different ways of doing things because only through that kind of tolerance can we keep open the doors to the future.

Paradigms dramatically affect our judgment and our decision making by influencing our perceptions. We must recognize our present paradigms and then go on beyond them. Remember, we see best what we are supposed to see.

Listed below are a few key observations of paradigms:

- Paradigms are common; we have them in all aspects of our lives – professionally, socially, as well as spiritually
- Paradigms are useful. They show us what is important and what is not. They focus our attention.
- Paradigms can become a negative if we let our paradigm become THE paradigm. This can lead to a form of paralysis. It is easy to get and few institutions have been destroyed by them i.e., the Swiss invented the quartz movement in watches but didn't think too much of the new data. They were paralyzed by an old set of paradigms.
- People who create new paradigms tend to be **OUT-SIDERS** because they are not caught up in the old mold. They have nothing to lose by creating new paradigms.
- You can choose to change the rules and regulation. Human beings are not coded into just one way of looking at the world. Adopt a new paradigm. We can choose to see the world anew! In other words, flex your paradigms.

If we remember one thing, let it be, that we understand our **PAST** success guarantees nothing! With a new outlook and a new approach, success is within our reach.

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**NATIONAL ALUMNI ASSOCIATION OF BETHUNE-  
COOKMAN COLLEGE  
DAYTONA BEACH, FLORIDA 32114**

Dear Alumnus:

It is my sincere privilege to bring you greetings in this – the inaugural Manual of Operation and Procedures of the National Alumni Association of Bethune-Cookman College, Inc. It is important to point out that this manual does not supersede or compete with the By-Laws of the Association, but serves as a resource tool that enhances, strengthens and adds clarity to the By-Laws. **Dr. Carver Portlock**, who served as Chairperson for this very important project, is to be commended for his outstanding leadership, and the sterling manner, in which he out this task. The other alumni, who served on the committee with Dr. Portlock - **Mrs. Ernestine Bivens; Mrs. Laveta Charity; Mr. Ronald Flowers; Dr. John L. Hamilton; Anderson C. Hill, II, Mrs. Barbara Johnson; and Mr. Willis Knowles.** - are to also be congratulated commended for the splendid manner in which they executed their job assignments. After two years of dedicated work, this comprehensive and informative manual is now a reality. We will have a better organization because of it, and we will conquer new vistas with it.

Again, I thank and congratulate the committee for a job well done, and I enthusiastically commend this manual to you for future reference and guidance in your work for Bethune-Cookman College through this Association. Please refer to it as often as the need arises.

The true value of this manual will only be revealed in the months and years to come, but based on what we hold in our hands today, the value of this document, both present and future, is enormous. I'm sure you concur.

Thanks and gratitude are extended to all of you for the great work you have done for this Association over the years. Keep up the excellent work, and may God richly bless you in all of your endeavors.

Very truly yours,

Julius H. Kidd  
President



## History

In 1904, a very determined young black woman, Mary McLeod Bethune, opened the Daytona Educational and Industrial Training School for Negro Girls with \$1.50, faith in God and five little girls for students. Through Dr. Bethune's lifetime the school underwent several stages of growth and development. In 1923, it became a co-ed high school as a result of a merger with the Cookman Institute of Jacksonville, Florida. A year later, the school became affiliated with The United Methodist Church; it evolved into a junior college by 1931 and became known as Bethune-Cookman College. In 1941, the Florida State Department of Education approved a 4-year baccalaureate program offering liberal arts and teacher education. Dr. Bethune retired in 1942 at which time James E. Colston became president until 1946 when Dr. Bethune resumed the presidency for a year.

Richard V. Moore, Sr. became the third president in 1947. Under his tenure, the college was accredited by the Southern Association of Colleges and Schools in 1970, joined the United Negro College Fund and other academic and professional organizations. The curriculum expanded, student enrollment increased and new buildings were constructed for residential housing and classrooms.



Oswald P. Bronson, Sr., Ph.D., an alumnus of the College, served as the institution's president for 29 years – from 1975 until 2004 when he was named president emeritus. Commitment to academic excellence was the cornerstone of his presidency. Under his leadership, major fields of study increased from 12 to 37. In addition, seven continuing education centers for students began operating throughout the state. While maintaining accreditation by SACS, Florida State Board of Education, and The University Senate of The United Methodist Church Board of Higher Education, the college added new accreditations in the Nursing and the Teacher Education programs.

Trudie Kibbe Reed, Ed.D., was appointed to the presidency in August 2004. The first woman to serve in this capacity since Dr. Mary McLeod Bethune, Dr. Reed has embraced her rich legacy of faith, scholarship and service. The institution launched its first master's degree program in 2006 and achieved University status in early 2007. The International Institute for Civic Participation and Social

Responsibility was launched in January 2005 as a way to reinvigorate the school's motto "enter to learn; depart to serve" as a call to action for 21st century learners to empower themselves and others, connect with their communities, and influence the world around them. A robust effort to expand and improve the school's physical plant is underway, with the purchase of nearby properties and construction of the Center for Civic Engagement and L. Gale Lemerand School of Nursing building already completed. President Reed has also led successful efforts to increase enrollment and the University's endowment, helping ensure the continued mission and financial stability of the institution.

After serving 11 months as interim president, Dr. Edison O. Jackson accepted the appointment to become the sixth president of the University on March 20, 2013, bringing with him a wealth of experience and knowledge in administering the affairs of educational institutions.

Since 1943, Bethune-Cookman University (B-CU) has graduated more than 16, 849 (as of 2013) students. Traditionally, B-CU has maintained intercollegiate athletic programs and instrumental and choral groups that have achieved national recognition. Many alumni are employed in the fields of education, medicine, business, politics, government, science, religion, athletics and environmental sciences.

## **TIMELINE**

- 1904 Begins as Daytona Educational and Industrial Training School for Negro Girls
- 1923 Merges with Cookman Institute of Jacksonville, Florida to become a co-ed high school
- 1924 Affiliates with The United Methodist Church; evolves into a junior college called Bethune-Cookman College
- 1931 Receives full accreditation
- 1941 Four-year baccalaureate program for liberal arts and teacher education is approved by the Florida Department of Education
- 2007 Achieves University status



# **UNIVERSITY VISION FOR THE FUTURE MISSION STATEMENT**

Founded by Dr. Mary McLeod Bethune in 1904, Bethune-Cookman University is an historically Black, United Methodist Church-related university offering baccalaureate and master's degrees. The mission is to serve in the Christian tradition the diverse educational, social, and cultural needs of its students and to develop in them the desire and capacity for continuous intellectual and professional growth, leadership and service to others. The University has deep roots in the history of America and continues to provide services to the broader community through a focus on service learning and civic engagement.

## **Vision for the Future**

BCU seeks to define a new standard for academic excellence as a way to become the best small college in the southern region. To educate and empower people to seek their own solutions, to advocate for opportunities for all citizens to improve their quality of life; and to include an international perspective that would facilitate a keen appreciation of the new global realities.

*Dr. Edison O. Jackson, President*

## **Mission of the University**

The mission of Bethune-Cookman University is to develop global leaders committed to service, life-long learning and diversity by providing a faith-based environment of academic excellence and transformative experiences.

*Revised by the Bethune-Cookman University Board of Trustees, October 2013*

**The university is guided by its core values:**

## **F .I .R. S. T.**

- F- Faith: We recognize and uphold the Christian tradition while welcoming the diversity of faiths
- I – Integrity: We live in a way that reflects our deepest convictions
- R – Respect: We recognize the inherent dignity and worth of each person
- S - Service: We seek social justice through civic engagement
- T - Thirst for Knowledge: We are engaged in the continuous pursuit of learning that transforms us and the world.

*Approved by the Bethune-Cookman University Board of Trustees, October 2013*

## SEAL OF BETHUNE-COOKMAN COLLEGE

In 1947, Dr. Cleo S. Higgins, who later became Vice President for Academic Affairs/Dean of the Faculty, and distinguished Professor designed the seal of the college which depicts the significant historical dates of 1872 (the beginning of the Cook man Institute for Negro Boys, Jacksonville), 1904 (the beginning of the Daytona Literacy and Industrial School for Training Negro Girls, Daytona Beach), and 1923 (the merger of the two institutions as a venture in higher education). The dates border a triangle imprint of “Head, Hand, Heart,” the inherent philosophy of the college on a circular base inscribed “Bethune-Cookman College.”



## CURRENT SEAL OF BETHUNE-COOKMAN UNIVERSITY

After the renaming of Bethune-Cookman College, to Bethune-Cookman University, a new university seal was unveiled in 2007.



## FAITH IN GOD

In the booklet “The College Built On Prayer (Mary McLeod Bethune)” by Jesse Walter Dess, Jr., it is written “...Arriving in Daytona Beach with only her personal belongings and her five year-old son, Albert, Mrs. Bethune found living conditions worse than she had expected; and she found in Daytona Beach that the Negro population was indifferent to her dream of a new school. She feared trouble because of recent activity of the Ku Klux Klan.

In September, 1904, Mrs. Bethune found an empty shack on Oak Street, a few blocks from the railroad tracks, that the owner said he would rent for \$11.00 a month. When all that Mrs. Bethune could offer was \$1.50, the owner trusted her.

With near-by neighbors, she went to the city dump heaps and to the refuse piles behind the famous resort hotels in Daytona. Here she found cracked dishes, bits of broken furniture, old brooms, lamps, clothing, and bedclothes. The furniture of her school consisted of packing crates and boxes and upturned baskets for chairs. Pencils were made from charred wood; ink was made from juice of wild elderberries.

On October 3, 1904, Mrs. Bethune’s school was founded under the name of the Daytona Educational and Industrial Training School for Negro Girls. Mrs. Bethune was the teacher and principal. The students consisted of five little girls, whose parents agreed to pay .50 a week tuition, and her five-year-old son, Albert.

The first day of school began with a hymn, “Leaning on the Everlasting Arms,” and the twenty-third Psalm—“The Lord is my Shepard, I shall not want...” These are the Tenets of Our Heritage.

Dr. Cleo Higgins, who knew and was a disciple and confidant of Dr. Mary McLeod Bethune from 1947 until Dr. Bethune’s death in 1955 shares this with us “...The 23<sup>rd</sup> Psalm (which she very

likely learned as a child or certainly in school somewhere) is an expression of the Ultimate supply for strength, and triumph over all odds”, companionship which she greatly needed. It is very likely (logical anyway) that the “arms” of this anthropological God/Deity/Creator would be the support (even cradling) that she needed to accomplish her mission. Of course (we are told) her faith was lived/animated/activated. So she knew she had it all! “How could she fail?”

**THE 23<sup>RD</sup> PSALM**  
**THE PERFECT PSALM**

Perfect Salvation:	<b>The Lord is my Shepard.</b>
Perfect Satisfaction:	<b>I shall not want.</b>
Perfect Rest:	<b>He maketh me to lie down in green pastures.</b>
Perfect Refreshment:	<b>He leadeth me beside the still waters.</b>
Perfect Restoration:	<b>He restoreth my soul.</b>
Perfect Guidance:	<b>He leadeth me in the paths of righteousness.</b>
Perfect Protection:	<b>I will fear no evil.</b>
Perfect Company:	<b>Thou art with me.</b>
Perfect Provision:	<b>Thou preparest a table.</b>
Perfect consecration:	<b>Thou anointest my head.</b>
Perfect Joy:	<b>My cup runneth over.</b>
Perfect Care:	<b>Goodness and mercy shall follow me.</b>
Perfect Destiny:	<b>I will dwell in the house of the Lord forever.</b>

The current college Chaplain, Rev. Dr. Rogers P. Fair, indicates “The Twenty-Third Psalm” was chosen by Dr. Mary McLeod Bethune in the founding stages of the college and became the official scripture of the institution.

Other religious Tenets of Bethune-Cookman College are the saying **“Our Whole School For Christian Service”**. This was posted at the main exit of White Hall. Dr. Fair says “This motto grew out of the early attempts of the school to develop a purpose or mission,” and is attributed to Dr. Bethune as a part of the purpose, rather than a statement in itself. It is considered symbolic by many of our graduates that this was the statement you saw in White Hall after having been introduced to the college motto, which held the place of focus and prominence upon entering White Hall Auditorium.

### **THE UNIVERSITY MOTTO:**

#### **“ENTER TO LEARN – DEPART TO SERVE”**

According to Dr. Fair, the college historian “This motto was introduced to the college by the founder”. It was however, transposed from Barber Scotia College where she attended school and where much of her early development took place. Dr. Cleo Higgins recalls having seen and touched the cornerstone at Barber Scotia College, which read “Enter to Learn – Depart to Serve”.

## **THE UNIVERSITY SHIBBOLETH**

When asked of Rev. Dr. Fair to define the word “shibboleth” he very forcefully responded, “...That on which we stand”. His research indicated that this song, which was sung at the birth of the college, fulfilled a continuing critical need through its early history and was, therefore, adopted by the founder, and college family as...

### **“THE UNIVERSITY SHIBBOLETH”**

#### **LEANING ON THE EVERLASTING ARMS**

What a fellowship, what a joy divine  
Leaning on the Everlasting Arm  
What blessedness, what a peace is mine  
Leaning on the Everlasting Arm.

(CHORUS)

Leaning, Leaning  
Leaning on the Everlasting Arm  
Leaning, Leaning  
Safe and secure from all alarm.

Oh, how sweet to walk  
In this pilgrim way  
Leaning on the Everlasting Arm  
I have blessed peace  
With my Lord so near  
Leaning on the Everlasting Arm.

(CHORUS)



“Gladly we Gather thy Praises To Sing” was our first School Song used from 1912. Mrs. Frances Reynold Keyser, the academic Director of the School at the time, composed the words, which, were sung to the tune of the “Glory Song.”

When Miss Josie Roberts arrived in 1915, to become the Music Teacher at the school, Mrs. Bethune asked her to set the words to an original tune, which she did. Students know this melody, which she composed.

## **SCHOOL SONG**

Gladly we gather thy praises to sing  
Loudly and clearly our voices shall ring  
Truly rejoicing, our dear B.C.C.  
Thy name forever in honor shall be.  
(CHORUS)

Oh B.C.C., so dear and so true  
Thy praise we're singing, our love bring to you  
God bless and keep us e'er faithful and true  
Loyal forever, B.C.C., to you.

Years may divide us, tho' far we may roam  
Our thoughts shall return to our beautiful home  
Loving and serving where e'er we may be  
Our lives shall prove our devotion to thee.  
(CHORUS)

“Mrs. Bethune was revered by the students and was a role model who seemed to be a continuous source of pride like the fountain that never runs dry. On one of her trips north to raise money one of the student leaders who directed the male quartet decided to write a new Alma Mater as a tribute to “The Madam” for her return to the campus”.

The year was 1936 and the student was Paul R. Roberts, internationally renowned Director of the Paul Roberts Singers of Philadelphia. Mr. Roberts revealed in a recent interview that he poured his heart into the writing of the Alma Mater because he felt he owed so much to the school and Dr. Bethune.

It appears that Mr. Roberts did not seem to have even a remote possibility of going to college. Dr. Bethune convinced Mr. Charles Chestnut to bring Mr. Roberts to the college and to pay for his education. Mr. Roberts shared that when he came to the college. "...All of my belongings would fit into a grocery bag."

From this meager beginning comes one of the most precious Tenets Of Our Heritage.

## **ALMA MATER**

Dear Alma Mater thou beloved  
We pledge our lives to thee  
Thou art result of toil and pain  
And tears come in a stream  
Dear Alma Mater thou art all  
And all the world to me  
Thou art the answered prayer of a dream.

Oh God, protect dear B.C.C.  
Crown her with love and cheer  
We'll ever sing our praise to thee  
It makes us strong and bold  
All hail to thee dear B.C.C.  
All hail to thee, all hail  
Hail thee, Maroon and Gold.  
Amen

In conclusion, we are unique and productive because our heritage is unique and full. When our seniors graduate they participate in The Service of Senior Consecration. A program unique to Bethune-Cookman that was originated in 1948, and written by Dr. Rogers P Fair, Sr., and the late Dr. Florence Lovell Roan.

We close this section with these “Gems”

“Seek to be an Artist,

Cease to be a Drudge”.

“Not for myself, but for others”

“I leave you Love...”

# NATIONAL ALUMNI ASSOCIATION

Bethune-Cookman University



## CONFERENCE PLANNING MANUAL

Updated 2007

July 3, 2007

Dear Alumni:

This first draft of this manual was written during our 33<sup>rd</sup> National Alumni Convention in 2001 at the request of President Myrtle Brown. It was later updated by adding applicable sections from MOPAC and changes in practices and procedures that are currently in use. It is intended to be used as a guide for the host chapter and the convention planning committee in planning for the annual conference/convention of the National Alumni Association.

It, like other National Alumni Association manuals and handbooks, will be periodically updated as needed to reflect current practices and procedures utilized in alumni operations.

I would like to thank former National President Robert Williams for his contributions to the original manual and current National President Jacqueline Mongal for her contributions to the update.

Sincerely,

John H. Williams

John H. Williams  
National President 1996-2000

The National President, who has overall responsibility for planning and implementing the National Alumni Association's annual conference/convention, shall select a conference theme, plan the agendas and program for functions/events and appoint a planning committee to work with the local chapter in facilitating the planning and implementation of the conference.

## **NATIONAL ALUMNI COFERENCE PLANNING COMMITTEE GUIDELINES**

The B-CU National Alumni Conference Planning Committee shall be composed of the following:

- National President (or designee)
- Local Chapter President (or designee)
- Treasurer
- Secretary
- Chairperson of Local Conference Committee
- Others as needed

### **Responsibilities of National Planning Committee:**

1. Prepare negotiation package including conditions, requirements, expectation, etc.
2. Recommend all contracts for presidential/Executive Committee approval and signing.
3. Have at least the National President (or designee) present at negotiations.
4. Coordinate the planning and execution of the conference

### **Responsibilities of local chapter's Conference Committee:**

1. Consult the National Planning Committee regarding needs and requirements of hotel negotiations.
2. Make initial contact with hotel(s) and make recommendation to National Planning Committee regarding selection of headquarters hotel.
3. Perform preliminary negotiations as requested by the National President.
4. Do not obligate the National Alumni Association or college in any financial or material way without the prior written approval of the Executive Committee via National President. (On one occasion we were charged thousands of additional dollars and on another we had to make future commitments to the hotel because we didn't meet attendance projections.)
5. Discuss and Mail or fax a copy of any written agreement or contract to the National President (prior to any signing) for his/her signature.
6. Complete and submit to the National Planning Committee a post Conference Report giving recommendations for the future.

**Discussions and/or negotiations with hotels shall include the following:**

1. Room availability (which depends on)
  - a. Location of Conference (city, state)
  - b. Past attendance record
  - c. Attendance projections (changes dependent on previous two years average attendance)
    - (1) 20-30 room nights on Thursday
    - (2) 30-40 room nights on Friday
    - (3) 40-60 room nights on Saturday
2. Hospitality/Social Area -- which involves music, dancing, food, alcoholic beverages, and socializing for 30 - 60 people, should be away from sleeping quarters.
3. Complimentary room(s) – one for Ms. Alumni (depending on number of rooms sold)
4. Suites - one for University President and one for the National President

Given below is a table of committees followed by preliminary Conference plans. A more detailed duties of the committees are given on page 24 - 27.

<b>COMMITTEE</b>	<b>CHAIRPERSON</b>	<b>RESPONSIBILITY</b>
Steering Committee		Under the directions of the National President, coordinate the overall planning for the Conference and provide assistance to the various sub-committees in planning and executing their functions, as may be necessary.
Registration (Local)		Plan and coordinate the registration process.
Souvenir Bags (Local)		Identify and select the bags to be used and secure favors to be included in the bags.
Public Relations	Public Relations Director	Plan and coordinate the publicity for the Conference
Vendors (Local)		solicit vendors and make arrangements for set-up
Programs/Luncheon/Banquet	Steering Committee	Plan and coordinate the luncheons, banquets and programs
Hospitality (Local)		Plan and coordinate the hospitality and social events at the Conference.
Music (Local)		Plan the music support and secure the performers for the various Conference functions.
Sponsorship		Secure organizations to serve as sponsors and to provide financial support for the Conference.
Souvenir Journal		Coordinate the solicitation of ads and the printing and distribution of the



		souvenir journal.
Ms. Alumni Contest		Plan and coordinate the Ms. Alumni Contest and Coronation.
Awards	TBA	Select national award recipients
Audit*	TBA	Conduct an annual mini-audit of financial records
Credential*	TBA	Verify attendance/voting eligibility of alumni/delegates
Necrology*	TBA	Plan and conduct the annual necrology ceremony
Time & Place*	TBA	Coordinate the selection of future Conference sites/dates
Resolution*	TBA	Using database of prior Conference resolutions as a guide, draft and present Conference resolutions

*\*Conference Committees are appointed at Conference site.*

1. The Steering Committee will have monthly meetings to give up-dates, discuss progress and ensure that subcommittees are functioning properly via teleconference beginning in January, bi-weekly meetings beginning in April and weekly meetings beginning in May. There should be one on-site meeting in March or April.
2. Timelines and short term goals should be set by each committee by February teleconference.
3. The National President, who has overall responsibility for planning and implementing the Conference, shall be kept abreast of everything that transpires.
4. The selected Event Planner shall assist with printings, developing a sponsorship package, production of the Conference souvenir journal and other functions as designated in the contract.
5. Each committee chairperson should select his/her committee members and begin planning and executing its functions beginning in January. Chairpersons should be prepared to give verbal and/or written reports at scheduled meetings.
6. The host chapter will seek chairs for Registration, Souvenir Bags, Vendors, Hospitality and Music Committees.
7. The local chapter president shall provide the telephone numbers and email addresses of all Conference chairpersons to the national president to facilitate communications.
8. Periodic updates shall be provided as we go along. Comments and suggestions from committee chairs and members are welcomed.

## **Additional Suggestions/Guidelines**

The objective of the planning committee is to plan a Conference to draw the maximum number of Alumni as possible.

Help plan and coordinate the activities of the Conference subcommittees.

Encourage as many Alumni as possible to stay at Headquarters Hotel so that the next chapter can have numbers to negotiate with for amenities.

Try to select a sponsor for all the social events. This will reduce the registration fee and allow more Alumni to register.

Send out pre-registration material early and set the fees for registration according to dates registration received. Use special activities as options for persons to purchase instead of adding to the registration fee.

Plan activities for Alumni and non-alumni members.

**DO NOT SCHEDULE ALL MEAL FUNCTIONS ON THE SAME DAY.** Select served meals because buffet meals take time from meeting and sometimes some tables are left without service.

Schedule free time for delegates so that they won't take business time for sightseeing or shopping. Schedule additional activities that will interest a new body of people. Relate activities with business sessions.

Develop a marketing strategy for the national Conference.

## NATIONAL MEETING PLANNING

### NATIONAL MEETING

#### I. General Information

- A. Place
- B. Date
- C. Number of chapters to expect (Use median number of last three (3) Nat'l Meetings)
- D. Theme
- E. Budget

##### 1. **Income**

- a. Provided by area
- b. Expected from registration
- c. Expected from ticket sales and program advertisements
- d. Provided by Host Chapter

##### 2. **Expenses**

- a. Banquet gift
- b. Banquet and luncheon
- c. Chapter suite (if needed)
- d. Courtesy
- e. Decorations, e.g., Flowers for tables, podium
- f. Entertainment
- g. Hotel accommodations for special guests
- h. Kits
- i. Machine rentals, e.g., typewriter, photocopy rental, computers, printers, faxes, etc.
- j. Musicians (if needed)
- k. Photographer
- l. Postage, stationary, receipt books, etc.
- m. Publicity
- n. Printing, e.g., Conference program, programs for meal functions, memorial service and closing banquet
- o. Speaker for civic luncheon
- p. Transportation, as needed
- q. Hospitality suite
- r. Organ/piano rental (if needed)
- s. Chapter signs or banners for business meetings

## **II. Duties of Conference Chairperson**

The Conference chairperson shall be appointed by the National President and shall be responsible for coordinating the planning of the Conference with the local chapter and directing the work of all committees handling the mechanics of the Conference.

Specific duties are as follows:

- a. Gets the approval of the National President prior to signing any contracts or obligating the alumni association in any legal way.
- b. Makes such committee appointments as may be delegated by the National President of the Alumni Association.
- c. Calls a meeting of all committees to consider the requirements of the Conference.
- d. Prepares instruction sheets for all committees. Gives each committee chairperson a list of all committee chairpersons with addresses and telephone numbers. (The Chapter Presidents may assist in this area.)
- e. Calls a meeting of local committees prior to planning Conference with National President (or his/her designee).
- f. Meets with National President or designee to report progress of Conference planning by the Host Chapter.
- g. Informs local committee of tentative Conference schedule and instructs them on further possibilities.
- h. Receives the final copy of the Conference program from the National President or designee and has it printed in accordance with plans approved by the National President or designee.
- i. Prepares a list of Conference officials and special guests for distribution to committee so that special attention can be given to their needs. This list usually includes:
  1. College Officials
  2. Present and Past National Officers attending the Conference
  3. Present and Past alumni queens attending the Conference
  4. Other special guests such as speakers for luncheon and banquets

### **III. Planning and Preparation**

Chapter President visits sites and make recommendations to the Executive Committee. The National President or designee visits sites, accesses facilities, confers with management, and makes final decision and signs contract with hotel.

### **IV. Conference Committee Duties**

The Conference Chairperson, along with the Chapter President or his/her representative, names the chairpersons for the various committees. The members of the committees should be selected by the appointed chairperson in consultation with the Conference Chairperson. Some of the committees are as follows:

- a. Registration
- b. Public Relations
- c. Program
- d. Favors and Kits
- e. Hospitality and Entertainment
- f. Transportation
- g. Decorations
- h. Exhibit Display
- i. Event Planning

# **COMMITTEES AND DUTIES**

## **REGISTRATION**

1. Sets deadline date for closing of pre-registration.
2. Keeps the Chapter President, Conference Chairperson, Secretary and Treasurer advised as to registrants by names and chapters, both in relation to pre-registration and during the Conference.
3. Receives all monies. Keep accurate records of monies collected, giving receipts for same.
4. Processes and forwards all monies and registration forms to National Financial Secretary.
5. Retains receipts for all registration committee expenses.
6. Forwards bills to Treasurer for payment.
7. Prepares name tags for each registrant with badges for voting delegates.

## **PUBLIC RELATIONS COMMITTEE**

Work along with Event Planner to:

1. arrange for radio, television and newspaper coverage. Build pre-Conference publicity around public meeting and alumni program as well as outstanding achievements of local chapter.
2. Arrange for publicity during Conference.
3. Utilize local & out-of-town media to publicize conference.

## **PROGRAM COMMITTEE**

1. Select speakers and other participants for those slots in over-all program as indicated by Conference Chairperson.

2. Firm up arrangements with participants by letter, indicating specific date, time, subject matter or responsibility and length of time allowed. Most speakers prefer to know in advance what is expected of them. **TIMING IS IMPORTANT IN RELATION TO THE TOTAL CONFERENCE AGENDA!!!**
3. Write thank-you letters to participants following Conference, with copies to the Conference chairperson.

### **SOUVENIR BAGS, FAVORS AND KITS COMMITTEE**

1. Obtain kits for registrants and prepare same for distribution at time of registration.
2. Secure items to be given as door prizes.

### **HOSPITALITY COMMITTEE**

1. Hospitality Committee should be assisted by all chapter members, as needed.
2. Arrange for refreshments for Hospitality Rooms.
3. Plan and carry out whatever entertainment is decided upon for Hospitality Rooms.
4. Make any other plans which fit comfortably into overall program.

### **TRANSPORTATION COMMITTEE**

Work with Steering Committee to:

1. Provide participants with advance information and directions to site by air, bus, train, and car. Wherever possible, give approximate cost.
2. Arrange for transportation for special guest and speakers.
3. Arrange for transportation for any activities planned away from the Conference Site.

## **DECORATIONS COMMITTEE**

1. Plan around the selected conference theme.
2. Arrange for flowers for appropriate occasions.
3. Transfer floral arrangements from one point to another as the need arises.
4. Provide white candles for memorial service of deceased B-CU family member for the past year.
5. Provide a corsage for guest banquet speaker, if a woman.
6. Other courtesies may be arranged as needed.

## **BREAKFAST, LUNCHEON, AND BANQUET COMMITTEE (STEERING COMMITTEE)**

1. Make recommendations on menus. Study menus carefully to assure balanced meals and variety.
2. Confer with Hotel Food Service Director about menus, cost per person, available appointments, etc.

## **EXHIBIT DISPLAY COMMITTEE (VENDORS COMMITTEE)**

1. Arrange for exhibits.
2. Make arrangements at Conference site for display of Chapter exhibits and other commercial exhibits.
3. Prepare and mail request to chapters for exhibits. Be sure to include specific mailing instructions for any advance mailings.

## **EVENT PLANNER**

1. Design information to be included in series of flyers and dates to be mailed to all area chapters in advance, indicating registration fees, etc. Coordinate with other



committees so that mailings may include information re: activities, special attire, etc., information should be mailed three (3) months before Conference. Secure printed cards from hotel listing rates, etc., to be sent to chapters with registration materials.

2. Assist with printings, developing a sponsorship package, production of the Conference souvenir journal and other functions as designated in the contract.
3. Negotiates with printer for all printed materials, including programs, invitations, rituals, tickers, etc. These items may be planned by other committees, but it is best for one committee to negotiate with printer. Be sure that copy, design, etc., are approved by President before final printing and that a definite price is agreed upon in writing, including number of copies. Copy and design for official Conference Program should be approved by the National Conference Chairperson.
4. Write thank-you letters for any gratis entertainment or hospitality; send copies to National President.
5. Prepare place-cards for head tables for breakfast, luncheon and banquet and assist with correct seating.
6. Make arrangements for “reserved” table signs to be used as necessary.

## SUGGESTED FOUR DAY CONFERENCE MODEL

### THURSDAY

2:00 p.m. - 8:00 p.m.	Registration
4:00 p.m. - 6:00 p.m.	Executive Meeting
8:00 p.m. - 9:00 p.m.	Opening Session

\_\_\_\_\_, National President, Presiding

Invocation  
Welcome  
Greetings  
Miss Alumni  
Announcements  
Adjournment

### FRIDAY

8:00 a.m. – 8:00 p.m.	Registration
9:00 a.m. – 10:30 a.m.	Business Session

\_\_\_\_\_, National President, Presiding

10:45 a.m. – 12:00 noon	Standing Committee Meetings
12:00 noon – 1:30 p.m.	Luncheon

\_\_\_\_\_, Host Chapter Representative,  
Presiding

Invocation

Musical Selection  
Welcome & Greetings  
Awards (if any)

- a. Human Resources Development Award
- b. BCC Service Award
- c. Distinguished Contribution Award

Introduction of Speaker  
Speaker  
Announcements  
Adjournment

2:00 p.m. – 4:00 p.m. Workshops

9:00 p.m. - ?????? Social

## **SATURDAY**

7:30 a.m. – 9:00 a.m. Mary M. Bethune Alumni Breakfast

\_\_\_\_\_, Host Chapter Representative

Awards (if any)  
- Shaft of Light  
- Distinguished Alumni  
- Distinguished Service Award  
- Edward R. Rodriguez Award  
Commemorative of our Founder

8:00 a.m. – 2:00 p.m. Registration

9:30 a.m. – 11:00 p.m. Business Session

\_\_\_\_\_, National President, Presiding

Standing Committee Reports  
Speaker – Director of Alumni Affairs

11:30 a.m. – 1:00 p.m. Luncheon

\_\_\_\_\_, Host Chapter Representative,  
Presiding

Invocation  
Musical Selection  
Awards (if any)  
- Recruitment of the Year Award  
- Distinguished Alumni Award  
Introduction of Speaker  
Speaker  
Announcements  
Adjournment

1:30 p.m. – 4:00 p.m. Business Session

\_\_\_\_\_, National President, Presiding

Award (if any) presented by College President  
- Chapter of the Year Award  
Introduction of Speaker  
Speaker – President of the College  
Announcements  
Adjournment

6:30 p.m. – 7:00p.m. Life Membership Reception

7:00 p.m. – 9:00p.m. Banquet

\_\_\_\_\_, National President, Presiding

Invocation  
Musical Selection  
Dinner  
Award (if any)  
- Shaft of Light Award  
Installation of Officers  
Address – Current/Newly National President  
Adjournment

9:00 p.m. – ????? Social

## **SUNDAY**

8:30 a.m. – 9:00 a.m.	Ceremony of Necrology (see appendix)
9:15 a.m. – 10:00 a.m.	Conference Critique
11:00 a.m. – 12:15 a.m.	Religious Services

## **ADJOURNMENT**

## **SUGGESTED FIVE DAY CONFERENCE MODEL**

### **WEDNESDAY**

3:00 PM - 8:00 PM	Registration & Information
8:00 PM - 11:00 PM	Welcome Reception

### **THURSDAY**

8:00 AM - 5:00 PM	Registration & Information
8:00 AM - 9:00 PM	Continental Breakfast
9:30 AM - 12:00 PM	Community Activity/Committee Meetings
12:00 PM - 2:00 PM	LUNCH ON YOUR OWN
12:00 PM - 1:45 PM	Executive Committee Meeting
2:00 PM - 4:00 PM	Opening & First Plenary Session
4:00 PM - 6:00 PM	Committee Meetings
5:00 PM - 6:00 PM	Miss Alumni Rehearsal
5:00 PM - 7:00 PM	ON YOUR OWN
7:00 PM - 9:00 PM	Banquet
9:30 PM - UNTIL	FUN NIGHT ACTIVITIES

### **FRIDAY**

8:00 AM -12:00 PM	Registration & Information
8:00 AM -10:00 AM	Mary McLeod Bethune Memorial Breakfast & Necrology Service (semiformal attire)
10:15 AM -12:00 PM	Second Plenary Session
12:00 PM - 2:00 PM	Past Presidents/Life Members Luncheon
2:30 PM - 4:30 PM	Seminars
4:30 PM - 8:00 PM	ON YOUR OWN
5:00 PM - 6:30 PM	Miss Alumni Rehearsal
8:00 PM – UNTIL	Miss Alumni Coronation & Dance (Formal Attire)

## SATURDAY

8:00 AM -10:00 AM	Registration & Information
8:00 AM - 9:00 AM	Continental Breakfast
9:00 AM -11:45 AM	Third Plenary Session
12:30 PM - 4:00 PM	Chapter Talk/Seminars/Planning for the future
4:00 PM - 7:00 PM	OWN YOUR OWN
7:00 PM - 9:00 PM	Awards Banquet (Semi Formal)
9:30 PM - UNTIL	FUN NIGHT

## SUNDAY

9:00 AM - 10:00 AM	Worship Service & Conference Closing
10:15 AM -12:00 PM	Executive Committee Meeting

### BETHUNE COOKMAN UNIVERSITY NATIONAL ALUMNI CONFERENCE REGISTRATION LIST LOCATION \_\_\_\_\_ DATES \_\_\_\_\_

LAST NAME	FIRST NAME & M.I.	STREET ADDRESS	CITY/STATE/ZIP	TELEPHONE	EMAIL ADDRESS

Updated 2007  
Jacqueline Mongal, National President

# **AWARDS PROGRAM**

Bethune-Cookman University Alumni provides this program each year to:

- ✓ Stimulate and motivate individuals and chapters to do an outstanding job.
- ✓ Recognize those who do an outstanding job.
- ✓ Improve the effectiveness of B-CU as a great school.
- ✓ Provide a means by which outstanding performance can be revealed and shared with others who can benefit.

## **AWARDS TO BE PRESENTED**

### **INDIVIDUAL AWARDS**

All members of the B-CU Alumni are eligible to be considered for the SHAFT OF LIGHT AWARD. The following criteria will be used by the AWARDS AND RECOGNITION COMMITTEE to select winners.

- ✓ Contribution to National, Regional, Chapter or other B-CU groups.
- ✓ Contribution to the individual's employer.
- ✓ Contribution to human resource development in community and/or nation.
- ✓ The President's SHAFT OF LIGHT AWARD is the highest award an individual can receive from B-CU. It should perpetuate the memory of B-CU's presidents, whose leadership and contributions in many areas over many years were instrumental in the growth and development of the school.
- ✓ A financial member of the National Alumni Association.
- ✓ A graduate of the school.

### **EDWARD R. RODRIGUEZ AWARD**

- ✓ Contributed at least two (2) years of exceptional service toward the development of the local chapter and the National Alumni Association.
- ✓ An individual that has demonstrated integrity and exemplified leadership qualities.

### **DISTINGUISHED CONTRIBUTION AWARD**

- ✓ Should be presented on a limited basis to non-B-CU members or groups for outstanding contribution to the school.

### **ORGANIZATION AWARDS**

- ✓ B-CU SERVICE AWARD, presented to those suppliers of educational products and/or services who have made an outstanding contribution to the education profession by developing new technology or outstanding program design.
- ✓ B-CU AWARD FOR HUMAN RESOURCES DEVELOPMENT, presented to employers of B-CU members who have given outstanding support to the development of human resources within their organization. This is an excellent opportunity for alumni to present outstanding “results-oriented” educational programs.



## ENTRY PROCEDURE

All individual, organization entries for the Award Program must be submitted on a standard form. (See Appendix)

Members are encouraged to submit qualified applicants for any of the awards. Entry forms should be typewritten and double spaced, and are not to exceed two (2) pages, including the title page provided in the form. Exhibits are not recommended unless requested by the AWARDS AND RECOGNITION COMMITTEE, or permission has been received to attach properly described accomplishments. Entry data will not be returned.

Judging will be completed by the AWARDS AND RECOGNITION COMMITTEE.

The AWARDS AND RECOGNITION COMMITTEE shall be composed of the National Vice President, two chapter presidents, two members of the Executive Committee and two former national presidents, to serve no more than two consecutive two-year terms in a six year span to establish procedures, guidelines and criteria for the nomination and selection of national alumni award recipients. The committee shall elect its chairperson and based on the established criteria, in secret, determine the award recipients to be announced at the annual National Meeting. (4/2001)

All entries must be submitted to the AWARDS AND RECOGNITION COMMITTEE at least two (2) months prior to the convention.

## ANNUAL AWARDS GIVEN BY THE NATIONAL ALUMNI ASSOCIATION

### THE NATIONAL AWARDS AND THEIR CRITERIA ARE:

1.     **The Shaft of Light Award:** The highest alumni award given, this award should go to the alumnus who best demonstrates the spirit and philosophy of Mary McLeod Bethune in their work stations as well as in their daily lives. They should have, through demonstrated examples, shown the "...ability to turn hardships, frustrations, disappointments, and confusion into Shaft's of Light'." The award receipt must be:
  - a.     A member of the National Alumni Association in good standing
  - b.     A graduate of Bethune-Cookman College (University)
  
2.     **The Distinguished Service Award:** This award would go to an individual or group who through successfully completed projects has reflected positive good to the National Alumni Association and /or Bethune-Cookman University. The recipient must be a member of the National Alumni Association in good standing.
  
3.     **The Distinguished Alumni Award:** This award would go to a graduate of the college who through national achievement has reflected positively on the college and association as a role model. The award recipient must be:
  - a.     A member of the National Alumni Association in good standing
  - b.     A graduate of Bethune-Cookman College (University)
  - c.     Recognized for achievements outside of their support for the college and/or alumni association; and
  - d.     Have national achievements supported through public acknowledgement, e.g., publications (newspapers, magazines, etc.) or non-alumni sponsored public events (testimonial dinners, recognition programs, etc.)
  
4.     **Outstanding Chapter of the Year Award:** Is determined on the basis of the chapter having turned in to the National Association the highest amount of money during the year. Contributions to be considered toward this award must be into the NAA Office no later than close of the business day established and published.
  
5.     **Souvenir Journal Award:** Is determined on the basis of the chapter having turned in to the National Association the highest amount of money raised through selling of souvenir journal ads.
  
6.     **Edward R. Rodriguez Award:** The nominee must have rendered at least two (2) years of outstanding service to develop the local chapter and national alumni association.

7. **The National Membership Award:** shall be presented to the chapter generating the highest percent increase in National Alumni Association membership from the previous year.
- a. New annual members and life members combined shall be included in the count.
  - b. The National Alumni Office shall perform the calculations using the chapter count of national financial members utilized for the mailing of ballots.
  - c. The percentage increase shall be calculated as follows:
    - (1) subtract the current year's national membership from the previous year's national membership.
    - (2) dividing that difference by its previous year's national membership rounding the answer to four decimal places.
    - (3) Multiply the answer by 100% (which moves the decimal two places to the right) giving the answer as a percent.
  - d. In the case of a tie, a Co-Chapter National Membership Award shall be presented to the tied chapters.
8. **The National President's Pin:** shall be awarded to each outgoing president.

# NATIONAL ALUMNI ASSOCIATION BETHUNE-COOKMAN UNIVERSITY CHAPTER OF THE YEAR RECOGNITION

## CRITERIA

1. The chapter contributing the highest total contributions, all sources, through the NAA Office and/or directly to the college will be awarded 10 points.
2. The chapter with the highest percentage increase in National Memberships over the previous year will receive ten (10) points.
3. The chapter with the highest percentage increase in local memberships over the previous year will receive ten (10) points.
4. The chapter will earn two (2) points for each Life Membership subscription reported during the fiscal year, July 1 – June 30<sup>th</sup>.
5. The chapter with the highest number of registered representatives at the previous National Meeting will receive five (5) points.
6. The previous host of the National Meeting will receive five (5) points.

All appeals, challenges, disputes, etc., will be resolved by the Executive Committee.

Approved and adopted by the Executive Committee/Board of Directors on 10/27/89, revised by the Executive Committee/Board of Directors on 2/3/90. The words, National Body were removed and replaced with Executive Committee/Board of Directors at the April 21, 1990 meeting of the Executive Committee/Board of Directors.

Task Force:      A. Ray Brinson, Chairman  
                     Joe Choice  
                     Nat Davis

Charles Munnings  
Molbert Scrivens  
John Williams

## **ALUMNI CHAPTER OF THE YEAR RECRUITMENT AWARD CRITERIA**

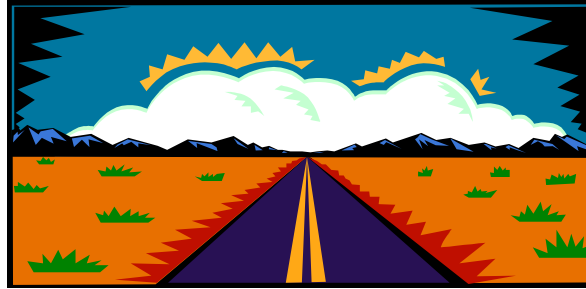
1. The nominees and awards recipient must be a member of the National Alumni Association in good standing in accordance with the bylaws of the National Alumni Association.
2. Nominee/Recipient must have demonstrated quantifiable results in:
  - a. Identify and establish a new recruitment market (25 points).
  - b. Participated in recruitment programs for the college (5 points per program).
  - c. Generate applicants through promotions and follow-up on prospective students (5 points per applicant).
  - d. Developed recruitment programs and promotions that can be replicated nationally (10 points per program or promotions).
3. Chapters can be nominated by the National Alumni Office, the Executive Committee of the National Alumni Association, or they may nominate themselves on the forms provided for this purpose by the Office of Admissions/Recruitment.

## ALUMNI RECRUITER OF THE YEAR AWARD CRITERIA

1. The nominees and award recipient must be a member of the National Alumni Association in good standing in accordance with the bylaws of the National Alumni Association.
2. Nominee/Recipient must have demonstrated quantifiable results in:
  - a. Identifying and establishing a new recruitment market (25 points).
  - b. Participating in recruitment programs for the university (5 points per program).
  - c. Generated applicants through promotions and follow-up on perspective students (5 points per applicant).
  - d. Developed recruitment programs and promotions that can be replicated nationally (10 points per programs or promotions).
3. Persons can be nominated by chapters, The National Alumni Office, or they may nominate themselves, on forms provided for this purpose by the Office of Admissions/Recruitment.

## **NATIONAL MEMBERSHIP DRIVE**

**JULY 1<sup>ST</sup> THROUGH OCTOBER 31<sup>ST</sup>**



The National Alumni Association has established an annual period wherein special attention will be given to the collection of National Alumni Association dues. Dues are due and payable on July 1<sup>st</sup> of each year for every person other than Life Members and subscribing Life Members. The period would be extended one month beyond September to accommodate persons who would be just returning to work or from vacation.

# PROCEDURES FOR BY-LAWS AMENDMENTS

1. Alumni and other interested individuals submit proposed changes in the By-Laws to the By-Laws Committee.
2. The By-Laws Committee reviews the proposed changes and decides what changes are to be recommended for adoption, if any.
3. The By-Laws Committee presents the recommended changes to the members of the Board of Directors for first reading during the Fall Board of Directors meeting.
4. The Board of Directors conducts the first reading of the proposed amendments either accepting them as proposed, rejecting them, or mandating changes to be made by the By-Laws Committee prior to the second reading.
5. The Board of Directors meet for the second reading of the proposed amendments at the Spring Board of Directors meeting for the purpose of reviewing any changes incorporated at the first reading and giving final approval for adoption or non-adoption.
6. The proposed amendments are mailed to the financial members or to the chapters for review at least 30 days prior to the National Conference.
7. At the final reading at the National Conference, A majority vote of the General Assembly at the National Meeting is required for final adoption of the revised document. Any new changes proposed after the second reading are referred to the By Laws Committee for consideration during the next revision cycle.





## **NATIONAL COMMITTEES AND SUBCOMMITTEES**

### **I. Board of Directors**

- A. Executive Committee
- B. By Laws Committee
- C. MOPAC Committee
- D. Chapter Committee
- E. Class Reunions Committee
- F. Awards & Honors Committee
- G. Nominations/Elections Committee
- H. Special, Convention and Ad Hoc Committees
- I. Contracts Committee

### **II. Budget and Finance Committee**

- A. Treasurer's Account
- B. Annual Budget Committee
- C. Chapter Assessment Committee
- D. Chapter Evaluation Committee
- E. Fundraising Committee

### **III. Scholarship Committee**

- A. B-CU NAA Endowed Account
- B. NAA Endowed Scholarship
- C. Pre-Alumni Endowed Restricted Account
- D. Chapter Scholarships

### **IV. National Projects Committee**

- A. Membership Committee
- B. Life Membership Committee
- C. Ms. Alumni Committee
- D. Alumni Center Committee
- E. Homecoming Committee
- F. Florida Classic Committee
- G. National Meeting Committee

Guideline Chapter Bylaws  
Bethune-Cookman University  
NATIONAL ALUMNI ASSOCIATION

CHAPTER NAME \_\_\_\_\_

*This chapter is licensed and authorized to do business under the Constitution and Charter of the National Alumni Association of Bethune-Cookman University and operates under its 501c tax-exempt status solely to benefit and support Bethune-Cookman University.*

*This document shall be the official Bylaws of the various alumni chapters unless a different set of Bylaws is written, officially adopted by a chapter, and a copy transmitted to the National Alumni Office.*

**ARTICLE I  
MEETING OF MEMBERS**

**Section 1 Time and place of regular meeting**

- a. The time of the meeting shall be the (date and time) or at the convenience of the host.
- b. Meetings shall be held once a month from September through June.

**Section 2 Notice of meeting**

- a. The secretary shall be responsible for sending notices
- b. All members in good standing shall be sent written notices of the monthly meetings.

**Section 3 Quorum**

- a. Those members present one half hour after the meeting starting time shall constitute a quorum as long as there is no less than four members.
- b. No proxy voting shall be allowed at any meetings.

**Section 4 Minutes**

- a. Minutes shall be read at each meeting.
- b. Minutes shall be approved by the Chapter.

## **Section 5 Special Meeting**

- a. A special meeting shall be held at the request or call of the President.
- b. The notice for the special meeting shall include the date, time, and place of said meeting along with the agenda items to be acted upon.

## **ARTICLE II MEMBERSHIP**

### **Section 1 Eligibility**

- a. All graduates of Bethune-Cookman College /University.
- b. All students of Bethune-Cookman College/University who attended at least for one semester and left in good standing.
- c. Associate members(Non- graduates) in good standing shall be entitled to all member privileges.
- d. Honorary members as norminated by the local chapters and presented to the Executive Committee/Board of Directors and elected by the Association at the National Meeting.
- e. Members in good standing shall be all persons described above who have met the financial requirements set forth by the Association and be a member of a local chapter, if there is one. A local chapter shall be defined as the city or county within a radius of 150 miles.

### **Section 2 Voting Rights**

- a. All members in good standing shall have the right to cast a ballot on issues before the house.
- b. Voting shall be by secret ballot for elections of officers.
- c. The presiding officer shall not vote unless voting is by secret ballot or a tie has to be broken.

### **Section 3 Dues**

- a. Each individual member of the Chapter shall pay an annual fee as stipulated by the Executive Committee at the National meeting for each fiscal year.
- b. The deadline for payment of annual fees (national dues) shall be April 1<sup>st</sup> of each year. Individuals or chapters submitting dues with a postmark after April 1<sup>st</sup> and the end of the fiscal year (June 30<sup>th</sup>) will be assessed a late fee of \$5.00 for each dues submitted.

## **ARTICLES III OFFICERS**

### **Section 1 Composition**

The officers of the Chapter shall be the President, Vice President, Recording/Corresponding Secretary, Treasurer, Parliamentary Chaplain, Director of Public Relations.

### **Section 2 Duties**

**a. President**

The President shall preside at meetings of the Chapter, serve as Chairperson of the Executive Committee; be a member of all Committees Exec. Officio, except the Nominating Committee and shall appoint all Committee Chairs and members. The President shall be the Chief Administrative Officer.

**b. Vice President**

The Vice President shall perform all the duties of the President during the latter's absence, and shall succeed to the Office of Presidency in the event of withdrawal or resignation of the President for any reason. The Vice President shall also perform such other duties as may be assigned by the Executive Committee.

**c. Recording/Corresponding Secretary**

The Secretary shall be responsible for all correspondence to and from the Alumni members as designated by the President of the Chapter. The Secretary shall keep a record of the proceedings of meetings (both regular and Executive Committee) and shall permanently preserve each ledger. The Secretary shall perform all other usual duties of such Office, and be subject to the directions of the President and Executive Committee of the Chapter.

**d. Treasurer**

The Treasurer shall be bonded, hold all funds of the Association in a reputable bank, write checks only after authorized by the President and/or Chapter. The Treasurer shall bear complete charge of all financial transactions of the Chapter. The Treasurer must deposit all monies not later than seven (7) business days after receiving said funds in an approved bank under the name of the Chapter. The Treasurer shall supervise the preparation of the annual budget and issue at least one (1) financial statement sixty (60) days prior to the close of each fiscal year. The Treasurer shall submit a complete financial report to the National Office by August of each year.

**e. Parliamentary**

The Parliamentarian shall advise the presiding officer of the rules governing situations of the sessions according to the By-Laws and Roberts Rules of Order upon the request of the Chair or members of the Assembly.

**f. Chaplain**

The Chaplain shall hold devotional periods before each session of the meeting. Executive Committee meetings and other called meetings using the Ritual outlined in the manual.

**g. Director of Public Relations**

The Director of Public Relations shall work in conjunction with the President, Executive Committee and Secretary in the distribution of news to the media.

1. In concert with the Secretary, maintain a current mailing list of all major media sources on all levels.

**Section 3 Term of Office**

Each officer shall serve for a term of two years, provided no officer shall hold the same office more than two (2) consecutive terms.

**Section 4 Executive Committee**

Actions of the Executive Committee must be reported to the Chapter in its regular meeting.

**ARTICLE IV  
COMMITTEES**

**Section1 Standing Committees**

There shall be Standing Committees

- a. Executive Committee consists of elected officers and shall act on behalf of the Chapter between meetings.
- b. Annual Fund Raising
- c. Membership and other committees appointed by the President as deemed necessary.

## **ARTICLE V RESIGNATIONS**

### **Section 1 Resignations**

- a. Members of the Chapter who wish to resign their positions whether elected, appointed, or on a specific Committee shall do so in writing. This statement of resignations shall be considered by the Executive Committee and may be accepted or rejected.
- b. Members of the Chapter who hold office whether elected, appointed or serve on a given Committee, may be requested to submit his/her resignation by a three-fourth (3/4) vote of the Executive Committee, for conduct, actions, which are not in the best interest of the University or Alumni Association.
- c. The vote of the Executive Committee on this matter may be taken by individual ballot. This is the only exception wherein a proxy or ballot may be sent in by a member of the Executive Committee rather than be present at the meeting.
- d. Members of the Chapter who hold office whether elected, appointed or serving on a given Committee who refuses to submit a resignation upon request shall be expelled from said post.

## **ARTICLE VI VACANCIES**

### **Section 1 Vacancies**

In the event any of the elected Officers of the Chapter shall become vacant for whatever reason, the vacancy shall be filled by the action of the body until the next election.

## **ARTICLE VII DISBURSEMENTS**

### **Section 1 Budget**

Elected Officers and Members of the Chapter shall adopt a budget of expenditures for the operational and fund-raising activities for the ensuing year.

### **Section 2 Mileage**

The Chapter President or a designee shall be allowed travel expense, at a rate voted upon by the body considering the condition of the budget, to authorized meetings as requested by other chapters or the National Alumni Association.

### **Section 3 Donations**

The Chapter shall mail all contributions, scholarships, or pledges for the college through the National Alumni Office as a matter of record, indicating the specific area in which it wants it spent.

## **ARTICLE VIII AMENDMENTS**

### **Section 1 Member**

These bylaws may be amended at the second reading by two-thirds (2/3) vote of the members present upon prior announcement, and the elected officers shall not override said amendments

### **Section 2 Procedure**

Amendments to change, add or delete must be in writing and signed by the presenter prior to the first reading to the membership. Two readings of the proposed amendment are required before the vote is taken.

# FUND RAISING IDEAS FOR CHAPTERS

FOR ALL CHAPTERS THAT HAVE AN ABUNDANCE OF TALENTED COOKS AND PERSONS FAMILIAR WITH THEIR WAY AROUND THE KITCHEN

## “FOUR FOR THE MONEY” RAFFLE

Will be an ideal, low overhead money making prize!!! Here’s what the winner will get...

1. A **Deluxe Meal** for up to five (5) persons to be served at a location\* provided to the winners on any 4 days (Saturdays and Sundays) in a given month.
2. Meals will be served by the Chapter persons and cleanup after the meals will be provided.
3. Meals will include a beverage (coffee and tea), entrée (Beef, Chicken, Fish or Pork), vegetables, starch, salad, and dessert.
4. Any meal for which preparation has been made and which is cancelled by the recipient will forfeit one of the choices of the recipient.

It is recommended that the raffle tickets be sold at \$2.00 per ticket or 3 for \$5.00.

Responsibilities for Chapter members would be divided into the following categories:

1. cooks
2. servers
3. clean up
4. arrangements

All chapter members would be expected to sell tickets, it is expected that at least \$150.00 in tickets would need to be sold to break even.



## **ALUMNI HALF AND HALF GIVE-AWAY**

(Sponsored by the Alumni Life Membership Club)

1. For Homecoming Raffle, the alumni office will get raffle tickets printed and distributed to the chapters at least one month prior to Homecoming. For the B-CC/FAMU game, the tickets shall be printed one week following Homecoming at the latest. Game schedules or circumstance may dictate earlier printings.
2. Initially, a minimum of 200 tickets is to be distributed to each small chapter and 500 tickets to each large chapter. Chapters can request more or less. Chapter will be billed for all tickets not returned by raffle time. Reasonable extensions on the reporting date can be arranged on an individual basis.
3. Each chapter will send to the alumni office by the Monday preceding the raffle via overnight express mail the completed financial ticket report, all monies collected along with the corresponding ticket stubs, and all unsold tickets.
4. Ticket sales the chapter will guarantee can be withheld from the package by completing the appropriate section of the ticket report. The remaining money and ticket stubs must be sent overnight express mail or hand delivered to the Director of Alumni Affairs on Thursday or Friday by 9:00 a.m. or at a designated place on Saturday before Homecoming Game.
5. The money that is collected and/or received after banking hours is to be stored in a secret and secured place until bank deposit (night or day) can be made.
6. On Homecoming Day, raffle tickets will be sold on campus from the side window of the ticket/security booth or from a portable ticket booth (to be constructed). At the B-CC/FAMU game, tickets are to be sold on Saturday morning using the portable booths or tables at the headquarters hotels. Raffle tickets will be sold out of the alumni office during the week of the games.
7. Money received is to be deposited in a secured account as soon as it is feasible.
8. Tickets will be sold from the corner of the concession stands or at portable booths near the concession stands during the game until mid-way through the third (3<sup>rd</sup>) quarter.
9. Reliable students working in pairs or threesomes shall be hired to sell giveaway tickets to spectators in the stadium. The pair or threesomes shall be assigned predetermined and recorded number of tickets for which they will be paid to sell to people in predetermined sections of the stadium. One of the pair or threesome shall issue tickets and hold the money while the others sell tickets to the crowd.
10. Two armed security guards shall be hired to transport the money from place to place during the game.

11. The drawing shall occur at the end of the third (3) quarter near one of the end zones.
12. The winner shall receive 50% of the proceeds of all raffle tickets sold by raffle time.  
Proceeds that arrive after the raffle time shall go into the Life Membership Club's treasury.

(FROM THE DELAWARE VALLEY CHAPTER)  
BETHUNE-COOKMAN UNIVERSITY ALUMNI  
PRESENT

A FOODLESS LUNCHEON HONORING – (Local Alumni, etc.)

WHEN:

WHERE: Place of your choice

TIME: 12 Noon

PRICE INCLUDES: \$10.00

The cost of your meal  
Which you do not eat  
And a prayer for the students  
Whose need you'll help meet  
Donate to the training  
Of HEAD, HEART and HAND  
Of future leaders  
Spread throughout the land  
The finest attire,  
You won't have to wear  
This pat on the back  
Says to students "I CARE"  
To honor one of the finest  
Good has put on this earth  
Whose life has been service  
Since the time of their birth  
A noon on the above date  
Please take time to pray  
For the health and well being  
However, you join us,  
We thank you for sharing  
In all that we do,  
To portray our caring!

RSVP: Addressed envelope enclosed, contributions are income tax deductible,  
Please make checks payable to:

## **MORE FUND RAISER IDEAS**

Since most banquets and luncheons call for tremendous overhead that go into the coffers of Hotels and Restaurants, this fundraiser is designed to encourage maximum participation by:

- a. honoring someone well known, and well respected
- b. keeping participatory cost to a minimum
- c. providing biographical data along with the above invitation on the honoree which justifies the selection.
- d. provide for a souvenir journal which all participants (\$10.00 dollars or more) will receive and which also offer the opportunity for additional resources through ads. Journals could be printed or mimeographed (Xeroxed).

**Each chapter president will receive in the mail their chapter assessments for the ensuing year. Chapter assessments include national alumni dues, individual contributions, Funds generated from the Ms. Alumni Contest, and proceeds from fund raising activities. The Executive Board strongly urges all chapters to meet or surpass their chapter's assessment. We are also asking each alumnus to put Bethune-Cookman University in their budget and make a generous contribution to the university.**

**If all were to contribute to this program, we can have a substantial impact on the physical and financial fitness of our beloved alma mater.**

### **Suggested Fund Raisers to help chapters meet their assessment:**

- Banquets honoring
- Food sales (Bake Sales, Dinners and Bar-B-Ques, Stay-at-Home Teas)
- Give-aways
- Seafood festivals
- Competition games with other alumni chapters
- Fashion shows
- Musical concerts
- Baby contests
- House parties (Round Robin, Waistline, Guess Weight)
- Teenage talent shows
- Step shows
- Radio telethon
- Garage sales
- Candy and/or nut sales
- B-CU Membership Round-up

If you have other fund raisers that have been successful for you, please share them with other chapters by sending them to the National Alumni Office.

## **CHAPTER ANNUAL EVALUATION**

### **Bylaw Language**

All chapters will be evaluated annually. Any chapter not participating in the activities and function of the National Alumni Association for one year will be placed on probation. The chapter will receive written notification of the violation from the Executive Committee. If the chapter fails to respond they will be declared an inactive chapter until the Executive Board/ Board of Directors recommends reinstatement or termination. If the chapter responds and after the Executive Board/ Board of Directors determines conditions are such that caused the chapter to be in non-compliance the Executive Board/Board of Directors will make recommendations for the chapter becoming active.

Chapters will be withdrawn, placed on probation, or suspended based on the following:

1. Fails to pay assessment for two consecutive years (unless that chapter had a valid reason for non-payment).
2. No meetings by the Chapter
3. No response by the Chapter
4. Fails to attend at least two (2) National meetings within a four (4) year time frame.

# LIFE MEMBERSHIP CLUB GUIDELINES

1. The Life Membership Club of the Bethune-Cookman University National Alumni Association shall be made up of alumni and supporters of Bethune-Cookman University who have paid the established membership fee (initially \$500.00 in 1983 and currently \$1,000.00 in the year 2000) to the life membership fund. The fee may increase over the years.
2. This money shall be deposited or invested with interest/dividend bearing financial institution(s) in such a manner as to generate maximum returns.
3. The principal shall remain intact in a perpetual growth endowment account to perpetuity that is used solely as a means of generating interest/dividend income for Bethune-Cookman University.
4. The one-time membership fee shall be set by the General Assembly of the National Alumni Association and shall be paid under one of the Life Membership plans given below or modification thereof (The payment plans will be adjusted to reflect the fee in effect at time of joining):

a. One-time payment of	\$1,000.00
b. Two yearly payments of	\$ 500.00
c. Ten monthly payments of	\$ 100.00
5. Additional fundraising activities and publicity shall be planned to increase the size of the account, show its potential and importance, and generate more widespread alumni support for the concept.
6. The National Alumni Association Life Membership Endowment Account, through accumulated dividends and new fees, shall grow to at least \$1,000,000.00 and remain to perpetuity. Once the account grows to \$1,000,000, a portion of the yearly interest shall be presented to Bethune-Cookman University to support the National Alumni Office and as yearly alumni contribution while the remaining amount is reinvested to increase the size of the account.
7. Unless specifically needed and approved by  $\frac{3}{4}$  of the members present in a duly called Board of Directors meeting, the interest shall be held-over in the account so as to speed its growth. Premature use of the yearly interest for extraordinary needs must be approved anew each year.
8. Alumni who have paid only part of their life membership fee shall be called "Subscribing Life Members."
9. If a Subscribing Life Member has not completed payment of the fee within four (4) years and after have been given three (3) written warnings, he/she shall lose "Subscribing Life

Membership” status. The alumnus can obtain his/her Life Membership status by paying the balance plus a \$25.00 reinstatement fee.

10. This money shall be deposited or invested with interest/dividend bearing financial institution(s) in such a manner as to generate maximum returns.
11. The principal shall remain intact in a perpetual growth endowment account to perpetuity that is used solely as a means of generating interest/dividend income for Bethune-Cookman University.
12. “Honorary Life Membership” can be awarded to non-alumni of Bethune-Cookman University from or for whom the established fee has been received by the National Alumni Association. They shall receive all privileges and honors awarded to Life Members.
13. A Life Membership Chairman and committee shall be appointed by the National President to oversee the fund raising activities, review the life membership guidelines for needed changes, and annually review the investment portfolio in order to safeguard the funds.
14. A complete financial report shall be given in writing each year at the National Meeting of the National Alumni Association.

**NAA POLICIES, OPERATIONAL AND PROCEDURAL  
POLICIES, RULES AND GUIDELINES  
Chronological Changes to MOPAC**

1. All officers of the Alumni Association at the national and local levels must be financial at both the local and national levels. (BOD 2009)
2. Only alumni who are registered for the National Conference, in good standing with the National Alumni Association (i.e., not under suspension or other administrative action), and financial with the NAA are eligible to participate in all conference activities including conference voting, decision-making functions and on-site voting. (BOD 5/7/10)
3. Alumni who are not registered for the National Conference are eligible to participate in fee-associated conference functions for which they pay the required fee but are not eligible to participate in plenary sessions, conference voting, national on-site voting or other decision-making activities or functions. (BOD 5/7/10)
4. When there is no qualified candidate for an open position by the established deadline, the Members of the Board of Directors can nominate by majority vote a consenting qualified alumnus to be placed on the ballot.
5. National offices which remain unfilled at the conclusion of formal elections at the National Conference may be filled from among the qualified candidates via a majority vote of the general assembly during a plenary session at the conference.
  - Identify who can verify a chapter member in good standing and define what is a member in good standing
  - Identify who should sign the nomination/candidate form if the Chapter President is a candidate.
  - Update the By-laws to reflect our current voting by mail practices **(By-Laws Recommendation)**
  - When a Write-in candidate's name has been submitted by a fellow NAA member, the nomination/candidate form is to be completed and submitted to the P.O. Box with a notarized letter giving his/her consent to have his/her name on the ballot as a write-in candidate - address in MOPAC
  - If the Nomination/Election Committee Chair is not from Volusia County or a chapter within 25 miles of the P.O. Box, at least one (1) Nomination/Election Committee Member should come from the Volusia Chapter
  - The database of National Members and Life Members become the property of the NAA of BCU, Inc. and therefore fall under the Technology Committee for the purpose of regular updating, maintenance and accessibility

## PARLIAMENTARY DEBATE GUIDELINES

The operational guidelines below are adopted to afford all alumni an equal opportunity to express their views on important matters while being conscious of time constraints. Ideas are to be opened for debate and discussion for a reasonable length of time prior to the call for a vote. Once minds are made up, the use of extended filibusters and other delaying tactics to obstruct voting are discouraged.

- **Identification of Speaker** - A member recognized by the presiding officer shall give his/her name and chapter before being allowed to address the assembly.
- **Four Minute Rule** – A speaker shall be allocated up to four (4) minutes to make an appeal, make a supporting statement or address the body.
- **Extension to Four Minute Rule** – The president or presiding officer, at his/her discretion, can grant an extension of up to two (2) additional minutes.
- **Speaking Limitation** – A member who is recognized by the presiding officer may speak no more than twice on an issue that is under discussion.
- **Fifteen Minute Rule** – Up to fifteen (15) minutes of debate time shall be allocated to “hot” issues after which a vote shall be called to settle the matter. The presiding officer can extend the time allocation if he/she deems the issue critical or the extension warranted.
- **Two Minute Follow-up Rule** – Following a decisive vote on a “hot issue”, the losing side can be allocated up to two minutes to address the body.
- **Committee Referrals** - Time-consuming issues that could be handled in committees will be referred to the appropriate committees for initial debate.
- **National Conference** – Only registered participants are allowed to vote during plenary sessions and on conference issues.
- **Board of Directors Meetings** – Only members of the Board of Directors, i.e., National Officers, Chapter Presidents and National Committee Chairpersons, are allowed to vote during meetings



## **ORGANIZING CLASS REUNIONS**



### **RECOMMENDED ORGANIZATION AND STRUCTURE FOR CLASS REUNIONS**

#### **IDENTIFY CLASS AGENT**

The class agent(s) is appointed and authorized by the National President to organize and coordinate the initial reunion function for the class. The agent(s) should preferably be the class president, class officer, or well-respected member of the class.

Class agent(s) will coordinate with the Director of Alumni Relations the arrangement of space for activities and functions requiring catering.

Class agent(s) will develop the overall schedule for the Reunion, to include, schedule of communications, meeting of planning group or class in preparation for the Reunion; solicitation of funds to promote and support the Reunion and Class Gift to the college.

The class agent(s) shall preside at all meetings of the planning committee and will report to the National Alumni President through the Chairman of the National Alumni Reunion Committee and the Director of Alumni Relations of the status on a regular basis.

Class agent(s) will make the arrangements for class lodging. Negotiate the best (lowest) rates for acceptable accommodations. The Alumni Office will be helpful in this regard as they annually survey the local hotels for the best rates.

Class agent(s) should appoint the following officers:

**Reunion Coordinator** – is responsible for developing program activities in conjunction with the class agent(s), select leadership for each activity of the Reunion; and reporting all reunion activities to the Chairman of the National Alumni Association Reunion Committee.

**Director of Communications** – in conjunction with Reunion Coordinator, is responsible for internal Communications (to members and sponsors of class). Making announcements to the class members reunion dates, time, place, and program. Development promotional materials that would be periodically sent to reunion class to generate interest and response. Shall correspond to media, parent institution and all other persons at facilities where reunion is to be held. Shall recommend to the Class Reunion Coordinating Committee Class Reunion Theme, Speakers and Program Participants, Class Reunion Activities (breakfast, hospitality functions, dance, etc.), Awards, Recognition, and Class gift. Shall be responsible for organizing and implementing registration before and during the reunion.

**Class Reunion Treasurer** – in conjunction with Reunion Coordinator is responsible for all fiscal matters pertaining to the class reunion. Develops and recommends operation budget and class reunion assessment to the Class Reunion Coordination Committee. Develops System for recording income and disbursements, accounting and reporting to the National Alumni Association within the guidelines established by the Constitution and By-Laws of the National Association. Will open class account at a bank in Daytona Bank through the National Alumni Association providing all appropriate information for the Class Reunion, report status of account, prepare fiscal report for class reunion and the National Alumni Association.

The National Reunion Committee Chairperson and the Director of Alumni Relations are ex-officio members of all Class Reunion Coordinating Committees.

## **RECOMMENDED SEQUENCE FOR CLASS REUNION ORGANIZATION AND DEVELOPMENT**

1. Emergence of Class Leadership to accept responsibility for Reunion Coordination.
2. Select year for Reunion weekend and numerical anniversary celebration (example: 1994 Reunion Weekend, 25<sup>th</sup> Anniversary Celebration).
3. Director of Alumni Relations will develop for media release for next issues of Alumni and related publications and article announcing:
  - a. The National Alumni Presidents appointment of the Class Agent
  - b. The names of the members of Reunion Coordinating Committee
  - c. The headquarters hotel for the Class Reunion
  - d. The dates of the Reunion Weekend
  - e. The date for the next meeting of the Class Reunion Coordinating Committee
  - f. Names, addresses and phone numbers for Class members to contact
4. First meeting of Class Reunion Coordinating Committee should accomplish the following:  
**Class Reunion Treasurer** would present proposed Reunion budget for discussion and approval after necessary adjustments. This would include program and activity budget lines and Class Reunion Gift to the College. **Class Reunion Program Coordinator:** present a list of proposed programs and activities with a recommended budget figure, which he/she would have submitted to the Class Reunion Treasurer at least two (2) weeks prior to this meeting of the Coordinating Committee (See program example). Present a list of proposed Reunion Themes. Recommend from the Class proposed speakers and program participants. Recommend Class Award Recipients. Present a plan for pre-registration and recommend class members to assist. Reunion Coordination Committee selects speakers and award recipient in order of preference

5. Director of Communications should always
  - a. Initiate communications to class to announce date, time, place, theme for Reunion Weekend
  - b. A list showing names and current known addresses of class members with space provided to indicate address correction or names and addresses of persons not listed.
  - c. Hotel brochure or information with reservation card and special rates, and
  - d. Enclose self-addressed envelop for speedy return of requested information (hotel reservations should be sent directly to the hotel and Class Reunion organization should have no further involvement in lodging arrangement.
6. Class Reunion Treasurer opens Class Reunion account in Daytona Beach, FL, in consultation with Director of Alumni Relations and in accord with guidelines for organization and structure for Class Reunion.
7. Class Agent writes to (1) program participants (speakers) and honorees and Class sponsors to secure their commitment to participant and to request vital curriculum and pictures to be used in promotion.
8. After receiving class responses with current and corrected addresses and additions: the pre-registration and remittance form (see example) should be sent to all current addresses. The process should be continued as long as corrected addresses are received. A deadline date should be established.
9. After receiving responses from and finalizing program participants Director of Communications will prepare media release for Alumni and College publications, major Florida media outlets and in the hometowns of the honorees and program participants. These should be submitted to the Director of Alumni Relations for release through the College Public Relations Office. Director of Communications will send Reunion questionnaire for completion and return by Reunion Class members. Deadline date should be established.
10. Class Agent should make catering arrangement through the Director of Alumni Relations if college facilities are selected or with the assistance of the Director of Alumni Relations if other than college facilities are used.
11. Reunion Coordinator and/or Director of Communications will develop wording for and order awards.
12. Class Reunion Treasurer will inform Class Agent, Class Coordinator and Director of Communications of the Reunion Class responses on a weekly basis so that cash flow and progress toward projected goals can be re-evaluated.

13. Class Agent will evaluate registration at Headquarters Hotels and responses to Class Reunion Registration to determine a final projection of participation so as to give the caterers a final count (usually projecting 10% over the actual count) at least ten (10) days prior to Reunion event).
14. Class Agent will check meeting rooms to see that they are adequate to your needs (outlets, availability to audiovisual, handicapped accessibility, etc.). See that your program principals are present and available at the time and place where needed. Have contingency plan for unforeseen problems such as absence of speaker, etc. Have financial report available for all Class members and finalize plans and level of Class Gift. Congratulate and thank each other for a job well done. Organize and select leadership for next Class Reunion. Do an evaluation report of Class Reunion and submit to the National Reunion Committee Chairperson for committee report to the next National Convention

The following forms and programs are provided for direction. They are by no means mandatory and offered only as an example of how it can be done. Each class is unique and therefore, the programs should be tailored to address your uniqueness. We especially invite you to be creative. Perhaps the next time we'll use your forms as a suggested example.

**Bethune-Cookman University**  
**Class of ‘ ‘**  
**Reunion**

Friday, July 27, xxxx  
 9:00 a.m. – 1:00 p.m.

Registration  
 Hospitality Suite

Afternoon  
 2:00 p.m.

Official Opening  
  
 Immediate Past Coordinator  
 Class of  
 Presiding

Roll Call

Class Secretary

Invocation...

Presentation of Class Awardees

- 1.
- 2.

- 3.
- 4.

#### Presentation of Class Sponsors

- 1.
- 2.
- 3.

#### Presentation of Reunion Speaker

#### Memorial Services

#### Committee Reports

1. Hospitality-
2. Fish Fry & Crab Feast-
3. Registration-
4. Finances-

**NATIONAL RITUALS**  
**AND**  
**CEREMONIES**

## NECROLOGY SERVICE

Reverend, \_\_\_\_\_, National Alumni Chaplain  
Presiding

Prelude

Moment of silence and meditation

Hymn.....Audience

Litany

Why we are here

Prayer

Scripture

Candle Lighting Ceremony

Alumni

The family members of Alumni

Faculty and Staff

Bethune-Cookman College Students



Hymn.....There Is A Balm

Meditation  
Benediction

## LITANY

**LEADER:** WE SHALL SEE A NEW HEAVEN AND EARTH, FOR THE OLD  
WILL PASS AWAY.

**PEOPLE:** WE SHALL SEE A NEW JERUSALEM, THE HOLY CITY DESCENDING FROM  
HEAVEN.

**LEADER:** THE CITY SHALL NEED NO SUN OR MOON, FOR GOD'S GLORY WILL BE  
IT'S LIGHT.

**PEOPLE:** FOR GOD'S LAMB WILL BE ITS LAMP, AND BY ITS LIGHT THE NATION'S  
SHALL WALK.

**LEADER:** WE SHALL HEAR A LOUD VOICE FROM THE THRONE.

**PEOPLE:** "BEHOLD, GOD'S DWELLING IS THE MORTALS. INDEED, GOD WILL DWELL  
WITH THEM AND THEY WILL BE GOD'S PEOPLE."

**LEADER:** GOD SHALL WIPE AWAY ALL OUR TEARS, AND THERE SHALL BE NO  
MORE DEATH.

**PEOPLE:** MOURNING, CRYING, AND PAIN SHALL CEASE, FOR ALL FORMER THINGS  
WILL PASS AWAY.

**LEADER:** WE SHALL HEAR ONE SPEAK FROM THE THRONE

**PEOPLE:** "BEHOLD, I MAKE ALL THINGS NEW. I AM ALPHA AND OMEGA, THE  
BEGINNING AND THE END.

**LEADER:** OUR LORD TESTIFIES TO THESE THINGS:

PEOPLE: “BEHOLD, I AM COMING SOON.”

**LEADER:** THE GRACE OF THE LORD IS WITH US.

PEOPLE: AMEN. COME, LORD JESUS! COME!

**STUDENTS NAMES IN MEMORY OF...**

**(List Names)**

**FACULTY and STAFF IN MEMORY OF...**

**(List Names)**

**FAMILY MEMBERS NAMES IN MEMORY OF...**

**(List Names)**

**ALUMNI NAMES IN MEMORY OF...**

**(List Names)**

## **FORMAT FOR ALUMNI MEETINGS**

It is recommended that all chapter meetings open with the Historical, ritual opening used by our Founder, Dr. Mary McLeod Bethune in establishing the institution in 1904. Substance is given to the various elements of this ritual in "Tenets of Our Heritage".

### **RITUAL FOR THE OPENING OF BETHUNE-COOKMAN UNVIERSITY ALUMNI MEETINGS NATIONAL, REGIONAL, CHAPTER**

#### **Leader (National President, Regional Officer, or Chapter President)**

This meeting of \_\_\_\_\_ is called to order with our Ritual opening. We invite the Brothers, Sisters, and Friends of Bethune-Cookman University to join in this ceremony which ignited this great ship of LOVE, HOPE AND PROMISE and launched it into the highest orbit of motivation and achievement. May we again be recharged to acknowledge and accept the lofty challenges set before us. We will now sing the University Shibboleth after which our Chaplain will lead us in the responsive reading of Psalm 23.

The University Shibboleth

#### **LEANING ON THE EVERLASTING ARM**

What a fellowship, what a joy divine,  
Leaning on the everlasting arms;  
What a blessedness, what a peace is mine,  
Leaning on the everlasting arms.

Refrain:  
leaning, leaning,  
Safe and secure from all alarms;  
leaning, leaning,  
leaning on the everlasting arms.

O how sweet to walk in this pilgrim way,  
leaning on the everlasting arms;  
O how bright the path grows from day to day,  
leaning on the everlasting arms.

(Refrain)

What have I to dread, what have I to fear,  
leaning on the everlasting arms?  
I have blessed peace with my Lord so near,  
leaning on the everlasting arms.

(Refrain)

## PSALM 23

Leader- Perfect Salvation:  
Response – The Lord is my Shepherd.

Leader- Perfect Satisfaction:  
Response- I shall not want.

Leader- Perfect Rest:  
Response- He maketh me to lie in green pastures.

Leader- Perfect Refreshment:  
Response- He leadeth me beside still waters.

Leader- Perfect Restoration  
Response- He restoreth my soul.

Leader- Perfect Guidance:  
Response- He leadth me in the paths of righteousness.

Leader- Perfect Protection:  
Response- Yea, though I walk through the valley of the shadow of death, I will fear no evil.

Leader- Perfect Company:  
Response- Thou art with me

Leader- Perfect Vision:  
Response- Thou preparest a table.

Leader- Perfect consecration:  
Response- Thou anointest my head.

Leader- Perfect Joy:  
Response- My cup runneth over.

Leader- Perfect Care:  
Response- Goodness and mercy shall follow me.

Leader- Perfect Destiny:  
Response- I will dwell in the house of the Lord forever.

The Chaplain will conclude with a short prayer after, which the Leader will proclaim,

LEADER- This meeting is now declared officially opened for the orderly and expeditious transition of whatever business needs to come before it.

## **ORDER FOR INSTALLATION OF NATIONAL OFFICERS AT CLOSING BANQUET**

**TIME ALLOTTED: 15 Minutes**

National Officers elected for the ensuing term of office shall be installed by the PARLIAMENTARIAN\*, at the final session of the National Alumni Meeting.

The PARLIAMENTARIAN\* may wish to give fitting remarks and may also outline the duties/job description of each of the officers.

PARLIAMENTARIAN\*: (To the outgoing officers, who are standing): Fellow alumni, you have served our organization with dedication, firm commitment and inspiring zeal. Each of you is about to resign your office and to all of you, we extend our appreciation for your untiring service; for through your efforts our organization has grown in ways that are intangible.

GIFTS/FLOWERS MAY BE PRESENTED AT THIS TIME.

PARLIAMENTARIAN\*: And now President \_\_\_\_\_, you will pass the gavel, all official books and records of your authority to our newly elected officers. (THE ABOVE STATED ITEMS ARE PHYSICALLY PASSED ON TO THE INCOMING PRESIDENT.)

PARLIAMENTARIAN\*: (To the newly elected officers, who are standing): And now Mr./Madam President, you, and your elected staff will raise your right hand and repeat the oath of office. "I \_\_\_\_\_, do promise to perform faithfully the duties of the office which I have been elected."

PARLIAMENTARIAN\*: Fellow alumni, I hereby declare National Officers of the BCC Alumni Association properly installed.

NEWLY INSTALLED PRESIDENT HAS FIVE (5) MINUTES TO ADDRESS THE AUDIENCE. \*\*

At this point, the banquet continues.

- \* President of the college can also be used for this function.
- \*\* Used to outline the goals and aspiration of his administration.

## **GRAVE SIDE CEREMONY**

**LEADER:** Having gathered today at this the final resting place of our late founder, President Emeritus, Dr. Mary McLeod Bethune, let us clear our hearts, minds, souls, and bodies of all worldly thoughts, and make of ourselves empty vessels so that our spirits may be rekindled anew, our strength be replenished manifold, and our determination to serve be filled to overflowing. In a state of humility, let us prepare ourselves for the prayer of rededication.

**PRAYER**

**RESPONSIVE OATH**

**LEADER:** Having pledged ourselves by virtue of the Bethune-Cookman University family to continuously prepare ourselves for leadership, realizing that the thirst for knowledge is virtually essential as we proceed to every situation.

**RESPONSE:** We must enter to learn, we must depart to Service.

**LEADER:** Having sometime ago, on this same sacred soil, taken the oath to give unselfishly of our time, talent, and material possessions to the growth and development of Bethune-Cookman University, may we again acknowledge our stewardship responsibility to maintain.

**RESPONSE:** Our whole school for Christian Science.

**LEADER:** As privileged benefactors of the high and noble heritage of the Bethune-Cookman University tradition, hearing the soul-piercing plea of a world that needs the benefits of our unique preparation, purging ourselves of greed and selfishness, may we always serve.

**RESPONSE:** Not for ourselves but for others (The Alumni wreath is then placed on the grave).

LEADER:      Flowers to surround the most radiant flower. The beauty of her life has inspired us all.  
May we now sing our Alma Mater; after which, we will receive the benediction.

## ACCOMPLISHMENTS OF NATIONAL PRESIDENTS

Dr. Willie J. Wright, President  
Bethune-Cookman College  
1956-1960

Elected in June of 1956, Dr. Wright followed the administration of Atty. Horace Hill who chartered the General Alumni Association as a National Organization. Dr. Wright, at the time of his election was the youngest National Alumni President in the state of Florida.

Under his administration, the “National Alumni Office” was centralized as the Treasury and Banking Association. The first alumni chapter charter was designed and printed as was the first alumni certificate of merit.

Dr. Wright was elected for a second term. During Dr. Wright’s administration, the late Mr. Lucious Davis was appointed as the first National Executive Alumni Secretary. Succeeding Mr. Davis in this position was Mr. James Hughes, Sr.

John S. Frink  
Bethune-Cookman College  
1960-64

In 1960 the Bethune-Cookman College National Alumni Association was at a particularly low point of production, contribution and progress. Operating within this challenging atmosphere the following achievements highlighted my administrations of 1960 – 62 and 1962 – 64.

1. Established first pre-alumni association in the history of Bethune-Cookman College and the national Alumni Association. Our objective was to prepare future alumni to be good contributing alumni, and subsequently, strengthen and expand our chapters and membership.
2. Established first alumni office replete with paid Alumni Executive Director.
3. Recruited Carver A. Portlock as first paid B-CC National Alumni Association Executive Director with exclusive alumni duties and responsibilities.
4. Chartered most of chapters in state of Florida with C.A.P. at our personal expense.
5. Issued charters to number of functional chapters that had never been chartered.
6. Established most ever out of state chapters.
7. Obtained membership in National Association of College and University Alumni Associations.
8. Secured membership in National Black Alumni Association.
9. Sponsored delegates to UNCF National Pre-Alumni Conventions.
10. Increased National Membership by more than 100%
11. Initiated first Endowment Program for B-CC resulting in largest ever alumni gift to B-CC in 1973 (\$15,000.00).
12. Developed strong foundation of successful administrations to follow.
13. Established the first “Alumni Day” observance in 1964.

Dr. Johnny L. Jones  
Bethune-Cookman College  
1976 – 1981

1. Reorganized and revitalized the Association
2. Organized the first Central Florida Classic where B-CC played FAMU in Orlando.

James Keys  
Bethune-Cookman College



## 1981-83

1. Established the VIP Committee to establish a long range and systematic plan for fund raising. Appointed Eugene McCray, Rev. Richard Chappelle, Rev. Beverly Lane, and Carver Portlock to this committee. These people became National Alumni Officers in the next administration.
2. Started the process for revising the association's By-Laws under the leadership of Atty. Reginald Moore.
3. Smith-Kline Beckman Academic Excellence Matching grant (\$50,000) dollars secured and first (\$5,000) dollars achieved under the leadership of Carver Portlock.

### Carver A. Portlock Bethune-Cookman College 1983-85

1. Established "News From The President" newsletter (mailed to Chapter Leadership) to re-establish the channels of communications with Alumni until The Clarion staff was re-organized and established under Dr. Richard Strachan.
2. National Alumni Association honored for the support provided by the U.N.C.F. at a Black Tie Banquet, November, 1983.
3. Established the first appointed positions:
  - a. Special Assistant to the President for Administration National President John S. Frink
  - b. Special Assistant for Athletic Affairs (Jack Hill of Orlando
  - c. National Legal Council (Atty. Morris Milton)
4. Revitalized the Class Reunion process through the Classes of 1951 and 1972 in 1983.
5. Secured the \$50,000 Smith-Kline-Beckman Academic Excellence Challenge Grant and organized the campaign for its Alumni Matching Grant in 1983 and 1984.
6. Developed a memorandum of Agreement with President Bronson for a \$35,000 package that would
  - a. Purchase the full time services of Mrs. Ann Beckton as Secretary in the Alumni Office.
  - b. Purchased 25% of the time and services of Dr. Roberto Barragan to serve as Acting Alumni Director
  - c. Provide for office rental, use of college and office equipment, supplies, travel, postage, printing, student work aides, telephone, etc. for the National Office staff.
7. First Alumni Directory developed under the leadership of Dr. Roberto Barragan in 1983.

8. Established Alumni Chapters in Ft. Lucie (St. Lucie County) and North Pinellas County.
9. Accepted and organized the Match for the first 1/3% of the James E. Davis \$75,000 dollars challenge grant to purchase the Allen Chapel A.M.E. Church.
10. Completed revision and adoption of the National Alumni Association By-Laws under the leadership of Atty. Morris Milton (1984).
11. Organized the **ALERT** (**AL**umni **E**mployment **R**esources **T**askforce) program under the leadership of Jacqueline T. Mongal to identify employment opportunities and develop Alumni employment network throughout the nation to upgrade or identify employment for Alumni.

**Attorney Morris Milton**  
**Bethune-Cookman College**  
**1985-86**

1. Successfully completed the matching of the financial 2/3's % of the James E. Davis Challenge Grant (\$50,000) dollars.
2. Spearheaded the development of the Life Membership Campaign for the National Alumni Association.
3. Secured National "Tax Exempt" status for the National Alumni Association (501.C.3)
4. Developed a more comprehensive and up-to-date Alumni Directory.

Attorney Milton died while in office before completing his first two-year term.

**Brenda Hawkes completed the remaining term becoming the 1<sup>st</sup> female National President.**

**Dr. Richard J. Strachan**  
**Bethune-Cookman College**  
**1986-1988**

1. Orchestrated a more proficient method of providing services to alumni by designing forms which allowed each chapter to facilitate meetings, objectives, budget, and financial statements.
2. Maintained a standing committee as indicated in the By-Laws and created additional committees for more alumni participation.
3. Orchestrated revisions, with acceptance, and printed a publication of the By-Laws in booklet form at no cost to the association.

4. Implemented concerted effort among the college alumni office and chapters to bring approximately 1500 prospective students to the campus for the first two Basketball Homecoming Games. In dollars and cents, we were talking about 9 million dollars.
5. Increased Life Membership to 80, which included 30 during my tenure. Commendations went out to the Chairman, John Williams.
6. Established an employment relationship with the placement office of B-CC and the Dade County Public School Personnel Office to hire prospective teachers on the spot. This effort negated from traveling to Dade County and provided the service on campus for them to sign a teaching contract, if they wanted to teach in Dade County, Florida.
7. Established business relationships with several lending institutions in Dade County to loan monies to parents of students needing money to attend Bethune-Cookman College. Barnett Bank was one of the lending institutes.
8. Organized the first Evaluating and Assessment Committee of scholarly alumni to conduct a study in specific areas at the college. The committee consisted of John Frink, Chairperson, Carver A. Portlock, Johnny L. Jones, Shelia Long, William Kornegay, Horace Boyer, Olga Thompson, and Robert Bryant.
9. Collaborated with Dr. Oswald P. Bronson to establish an alumni office in Philadelphia, Pa. To cover the Northeast with emphasis on recruitment, lobbying, increasing membership, public relations, raising money and etc.
10. Submitting and remitting over \$203,000 to the college with the amount of \$128,000 for 1988 from gifts, grants, scholarships and the Million Dollar Campaign.

## RECOMMENDATIONS

That Dr. John Hamilton continues with his project of preparing an "Alumni Prospectus" so alumni could have this historical document in their personal library as a thesis of our organization from its inception.

That each alumni, especially alumni presidents, be a committee of one to train, encourage, persuade, cajole, etc., young alumni to join the rank and file or start an association with their age group in an effort to maximize our endeavor toward "Alumni Partnership".

That the Million Dollar Campaign be continued, if there is corporate sponsorship to alleviate the cost for the satellite telecast and chapter presidents set the guidelines for its continuance.

That a concerted effort be taken by the association to assist in underwriting the expense of operating the Alumni Office as soon as possible.

That Dr. Carver A. Portlock continues to intensify alumni to broaden Class Reunions with emphasis on appropriating unrestricted monies for the college.

That a follow-up study supercedes the previous study to correct the findings in areas that need special attention.

That the association assigns someone to meet with the business office's vice president to identify monies being received from alumni not credited to the National Alumni Association.

That the National Alumni Officers concentrate on establishing an Alumni Office in Dade County to service its 600 alumni as the Northeast Region's Office.

Dr. Julius Kidd  
Bethune-Cookman College  
1988-1992

Dr. Robert Williams  
Bethune-Cookman College  
1992-1996

John H. Williams  
Bethune-Cookman College  
1996-2000

Under the leadership of President John Williams, the following initiatives and achievements were attained:

1. Initiated and published six **Alumni Newsletters** exclusively for and about alumni.
2. Published a **Chapter President Handbook** which summarizes the duties and responsibilities of local chapters and chapter presidents.
3. Initiated a policy of **honoring alumni** in given profession during annual conventions.
4. Set-up a free **chapter E-mail Internet account** for every alumni chapter.

5. Steered the **Life Membership Club** from its inception to a membership of over 325.
6. Supervised the growth of the two **National Alumni Life Membership Investment Accounts** to a current value of over \$220,000 (toward the ultimate goal of \$1,000,000).
7. Computerized and updated **MOPAC**.
8. Completed an update of the **National By-Laws document**.
9. Produce a generic **Chapter By-Laws** document for easy chapter use.
10. Published and computerized the **Ms. Alumni Guidelines document**.
11. Increased **alumni giving** to over 26%, which was at or above the national average.
12. Increased the number of active **alumni chapters** and their contributions to over \$47,000 per year.
13. Established a **National Alumni Student Work Aid Endowment Account** of \$15,000 to annually fund a work aid grant of \$1,500 for a B-CC student.
14. Established a **National Alumni Scholarship Endowment Account** with an initial grant of \$10,000 to fund an annual student scholarship of \$1,000.
15. Established a **National Alumni Memorial Scholarship Account** to award small stipends to B-CC students from money donated in memory of deceased alumni.

Myrtle Burrell Brown  
Bethune-Cookman College  
2000-2004

Under the leadership of President Myrtle Burrell Brown, the following initiatives and achievements were attained:

1. Instituted a team approach to decision making.
2. The NAA donated over \$250,000 to Bethune-Cookman College
3. Alumni chapters contributed over \$304,854.00 in assessments.

4. Increased the number of active alumni chapters.
5. Oversaw a sharp increase in the number of Life Members.
6. Saw the completion of the Mary McLeod Bethune Bronze Statue Project on campus.

Jacqueline T. Mongal  
Bethune-Cookman University  
2004-2008

Under the leadership of President Jacqueline T. Mongal, the following initiatives and achievements were attained:

1. Acquired an Alumni House which is now fully furnished including a computer lab
2. Given gifts of over \$400,000 in support to the institution
3. Purchased the Naming Rights of the Defensive Coach's Office in the soon to be built Football Training Center (FTC)
4. Established an Endowed Scholarship Account of \$100,00 in perpetuity with the interest funding 10 student scholarships
5. Established an Endowed Pre-Alumni Restricted Account of \$20,000 in perpetuity with the interest assisting the Pre-Alumni Council with activity expenses
6. Chartered two new Alumni Chapters
7. Regained NAA voting rights on the Board of Trustees
8. Establishment of a corporate fund raising committee which provided sponsorship for annual conference
9. Provided access for NAA members to purchase prime seating tickets for the Florida Classic
10. Obtained a website for the NAA

Evelyn B. Walker  
Bethune-Cookman University  
2008-2010

1. Conducted National Retreat for planning and setting goals for NAA.
2. Chaired two very successful annual conferences – West Palm Beach and Jacksonville, FL.
3. Re-organized the chapter in Ft. Pierce, FL.
4. Chartered a chapter in Ft. Myers, FL and internationally in Nassau, Bahamas.
5. Presented the First Indaba Festival in Winter Park, FL in February, 2010.
6. Establish and publish the B-CU/NAA Legacy Magazine.
7. For the first time ever the voting and election of officers at the 2010 convention was done with electronic voting machines with professional staffing.
8. Alumni House has been furnished through alumni efforts.
9. Secured assistance in the up-keep and daily operations expenses for the Alumni House through alumni giving

A. Ray Brinson  
Bethune-Cookman University  
2010-2014



# **APPENDIX**

## NATIONAL ALUMNI ASSOCIATION REGIONS

### Northeastern

Massachusetts  
Connecticut  
New York  
Philadelphia  
Pittsburgh  
Chicago  
Cleveland  
Virginia  
Washington, D.C.  
Detroit  
\*Indiana

### Central Florida

Daytona Beach  
Sanford  
Brevard County  
Lake County  
Orlando  
Polk County  
Ocala  
Osceola County  
Gainesville  
Lake City  
Live Oak  
Ft. Pierce

### Central - Atlantic

Atlanta, GA  
Charleston, SC  
Albany, GA  
Georgia  
St. Augustine, FL  
Jacksonville, FL  
Palatka

### Southeastern

Ft. Lauderdale  
Miami  
Tampa  
St. Petersburg  
West Palm Beach  
Sarasota  
Plant City  
Indian River County

### Southwestern

Pensacola  
Dallas/Ft. Worth  
California  
Tallahassee  
\*Alabama

The above new sections limit membership on the Board to 15 elected members and invest all power to run the association, to the Board. It also creates five (5) regions.

\*Currently without chapters, efforts should be made to develop



BETHUNE-COOKMAN UNIVERSITY  
NATIONAL ALUMNI ASSOCIATION

P. O. BOX 1899  
DAYTONA BEACH, FLORIDA 32115

## APPLICATION FOR ALUMNI CHAPTER

### Part I

Date of application \_\_\_\_\_

Chapter Location (City and State) \_\_\_\_\_

Submitted by: \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

Phone ( \_\_\_\_ ) \_\_\_\_\_ (Home)

( \_\_\_\_ ) \_\_\_\_\_ (Work)

### CHAPTER MEMBERS

Please Print or Type

Signatures

\_\_\_\_\_ President \_\_\_\_\_

\_\_\_\_\_ Vice President \_\_\_\_\_

\_\_\_\_\_ Secretary \_\_\_\_\_

\_\_\_\_\_ Treasurer \_\_\_\_\_

\_\_\_\_\_ Chaplain \_\_\_\_\_

\_\_\_\_\_

### FOR OFFICE USE ONLY

Date Received \_\_\_\_\_

Date Issued \_\_\_\_\_

Fee Received \_\_\_\_\_

Date \_\_\_\_\_

Send application and fee of \$50.00 to:

## APPLICATION FOR ALUMNI CHAPTER

### Part II

Alumni Chapters are the basic and most important unit of the Bethune-Cookman University Alumni Association. This application is an official document of the B-CU National Alumni Association and must be submitted for approval to the National Alumni Association Executive Committee. The following must be understood by the charter members (founders), all future officers and members of the chapter.

- I. We are interested in organizing a chapter of the B-CU Alumni Association.
- II. We believe that the purpose of the National Alumni Association is to promote the ideals and welfare of Bethune-Cookman University, to support the college financially, and to establish beneficial relationships between the college and alumni.
- III. We will adopt Constitution and By-Laws consistent with the Constitution and By-Laws of the National Alumni Association. We further understand that the National Constitution and By-Laws provide for the graduates to organize chapters to be presided over by the respective Regional Vice Presidents.
- IV. We will submit a report(s) of the chapter finances and activities to the National Alumni Association and/or the Alumni Office (to be submitted by May 1<sup>st</sup> each year).

We understand that the activities of the chapter will be published by the Alumni Office and/or the National Alumni Association (including the regular meeting date).

We, undersigned (charter members and founders), submit application for the \_\_\_\_\_ chapter of the Bethune-Cookman University Alumni Association (at least five (5) names).

_____	_____
_____	_____
_____	_____

Please attach a list of the names, addresses, year of graduation and telephone numbers of the above. Names and addresses of B-CC/B-CU graduates in your area should also be submitted to the national office.

**APPLICATION FOR ALUMNI CHAPTER**  
**Part III**

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

\_\_\_\_\_

TELEPHONE \_\_\_\_\_

GRADUATION DATE \_\_\_\_\_

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

\_\_\_\_\_

TELEPHONE \_\_\_\_\_

GRADUATION DATE \_\_\_\_\_

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

\_\_\_\_\_

TELEPHONE \_\_\_\_\_

GRADUATION DATE \_\_\_\_\_

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

\_\_\_\_\_

TELEPHONE \_\_\_\_\_

GRADUATION DATE \_\_\_\_\_

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

\_\_\_\_\_

TELEPHONE \_\_\_\_\_

GRADUATION DATE \_\_\_\_\_

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

\_\_\_\_\_

TELEPHONE \_\_\_\_\_

GRADUATION DATE \_\_\_\_\_

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

\_\_\_\_\_

TELEPHONE \_\_\_\_\_

GRADUATION DATE \_\_\_\_\_

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

\_\_\_\_\_

TELEPHONE \_\_\_\_\_

GRADUATION DATE \_\_\_\_\_



BETHUNE-COOKMAN UNIVERSITY  
NATIONAL ALUMNI ASSOCIATION

DATE \_\_\_\_\_

## MEMBERS IN GOOD STANDING

Submit this listing to the National Alumni Association of Members in Good Standing as described in Article III, Section I of the By-Laws no later than April 1, of each year.

CHAPTER \_\_\_\_\_

NAME \_\_\_\_\_

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

ADDRESS \_\_\_\_\_

TELE. NO. \_\_\_\_\_

TELE. NO. \_\_\_\_\_

NAME \_\_\_\_\_

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

ADDRESS \_\_\_\_\_

TELE. NO. \_\_\_\_\_

TELE. NO. \_\_\_\_\_

NAME \_\_\_\_\_

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

ADDRESS \_\_\_\_\_

TELE. NO. \_\_\_\_\_

TELE. NO. \_\_\_\_\_

**P. O. BOX 1899**

**DAYTONA BEACH, FLORIDA 32115**



BETHUNE-COOKMAN UNIVERSITY  
NATIONAL ALUMNI ASSOCIATION

## CHAPTER ANNUAL FINANCIAL REPORT

\_\_\_\_\_ Chapter

Fiscal Year \_\_\_\_\_ - \_\_\_\_\_

### REVENUE

Beginning Balance:.....\$\_\_\_\_\_

#### Income:

.....\$\_\_\_\_\_

.....\$\_\_\_\_\_

.....\$\_\_\_\_\_

Total Income.....\$\_\_\_\_\_

TOTAL REVENUE (Beginning balance plus total income).....\$\_\_\_\_\_

### DISBURSEMENTS:

#### Expenditures:

.....\$\_\_\_\_\_

.....\$\_\_\_\_\_

.....\$\_\_\_\_\_

.....\$\_\_\_\_\_

Chapter's Ms. Alumni Contest Contribution.....\$\_\_\_\_\_

Chapter Assessment (Sent to National Office).....\$\_\_\_\_\_

Total Expenditures.....\$\_\_\_\_\_

TOTAL DISBURSEMENTS.....\$\_\_\_\_\_

Ending Balance (chapter carryover).....\$\_\_\_\_\_

Signature\_\_\_\_\_Date\_\_\_\_\_

P. O. BOX 1899 DAYTONA BEACH, FLORIDA 32115



BETHUNE-COOKMAN UNIVERSITY  
NATIONAL ALUMNI ASSOCIATION

DATE \_\_\_\_\_

## MEMORIAL ROLL

We want to recognize and honor those who have passed since the last National Meeting. Please list the members below. Chapter Presidents are requested to submit this form six (6) weeks prior to the National Meeting. (Please Print)

NAME \_\_\_\_\_ NAME \_\_\_\_\_

YR. GRADUATED \_\_\_\_\_ YR. GRADUATED \_\_\_\_\_

RELATIVE OF \_\_\_\_\_ RELATIVE OF \_\_\_\_\_

NAME \_\_\_\_\_ NAME \_\_\_\_\_

YR. GRADUATED \_\_\_\_\_ YR. GRADUATED \_\_\_\_\_

RELATIVE OF \_\_\_\_\_ RELATIVE OF \_\_\_\_\_

Submitted By:

NAME \_\_\_\_\_ PHONE \_\_\_\_\_

CHAPTER \_\_\_\_\_

ADDRESS \_\_\_\_\_

(NOTE): Memorial roll includes Alumni, Associate Alumni, or Relative of any of the above Alumni. Please indicate YEAR GRADUATED. For Associate Alumni, please identify as such on YEAR GRADUATED line.

**P. O. BOX 1899 DAYTONA BEACH, FLORIDA 32115**





BETHUNE-COOKMAN UNIVERSITY  
NATIONAL ALUMNI ASSOCIATION

## NATIONAL CONVENTION SOUVENIR JOURNAL ADVERTISEMENT

Listed below are the sizes of advertisements that can be purchased for the National Convention Souvenir Journal. Please list the quantity and amount for each advertisement. For the amount of each advertisement, please refer to the cover letter. This form should be submitted to the hosting chapter six (6) weeks prior to the National Convention.

	<u>QUANTITY</u>	<u>AMOUNT</u>
FULL PAGE	_____	\$ _____
½ PAGE	_____	\$ _____
¼ PAGE	_____	\$ _____
BUSINESS CARD	_____	\$ _____
PATRON	_____	\$ _____
TOTAL	_____	\$ _____

SUBMITTED BY:

NAME \_\_\_\_\_ PHONE \_\_\_\_\_

CHAPTER \_\_\_\_\_

ADDRESS \_\_\_\_\_

**P. O. BOX 1899      DAYTONA BEACH, FLORIDA 32115**



BETHUNE-COOKMAN UNIVERSITY  
NATIONAL ALUMNI ASSOCIATION

## NOMINATION/CANDIDATE'S FORM

DATE \_\_\_\_\_

Please complete and return the following information along with a platform statement of 50 words or less. If you are using this form to nominate someone, please complete name, address, and nominator's signature only and forward this form to the candidate. This form and a platform statement from participants for nominations should be returned to *Bethune-Cookman University NAA Nominations, P. O. Box 1899, Daytona Beach, FL 32115* and must be postmarked by April 1, of this year.

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY STATE ZIP CODE EMAIL ADDRESS

HOME PHONE ( ) \_\_\_\_\_ CELL ( ) \_\_\_\_\_

Year of graduation from B-CU \_\_\_\_\_

Occupation \_\_\_\_\_ Employed By \_\_\_\_\_

Candidate for the office of \_\_\_\_\_

Civic, professional and fraternal organizations \_\_\_\_\_

Local and national offices held in the Alumni Association

Alumni Association Committee(s) on which you have served

Nominator's Signature (if applicable) \_\_\_\_\_

This candidate is a National Member in "Good Standing" with the local & National both this year and the past (check one) ☐ three years or ☐ one year.

\_\_\_\_\_  
Candidate's Signature

\_\_\_\_\_  
Chapter President's Signature

**P. O. BOX 1899**

**DAYTONA BEACH, FLORIDA 32115**

## NAA ELECTION PROCEDURE & DEADLINES

PROCEDURES	POSTMARK DEADLINE
1 <sup>st</sup> Mailing of election information: procedures, deadlines, vacant positions and candidate form	
2 <sup>nd</sup> Mailing of election information: procedures, deadlines, vacant positions and candidate form	
Host Chapter recommends 3 Accounting Firms (CPA) to Election/Nomination Committee	
Completed Nomination/Candidate's form for interested members in a NAA vacant office: <b>(List offices)</b> . Form must be addressed and mailed to: <b>BCU NAA Nominations, P.O. Box 1899 Daytona Beach, FL 32115</b> with a <b>postmark date no later than _____</b> .	
E-mail blast to Chapter Presidents emphasizing <b>April 1<sup>st</sup></b> financial eligibility deadline for voting rights	
Accounting Firm identified	
National Membership dues must be submitted to local chapters or postmarked no later than <b>April 1<sup>st</sup></b> to <b>BCU NAA, P.O. Box 1899 Daytona Beach, FL 32115</b> for <b>voting eligibility in current elections (life members excluded)</b>	
An updated list containing the names, mailing addresses, telephone numbers and email addresses where available of Life Members and National Financial Members as of the <b>April 1<sup>st</sup></b> cut-off date will be compiled by Elections chair and Financial Secretary for the purpose of mailing of ballot and returned labeled envelopes. This information will be retained on record for audit purposes if necessary.	
Request for absentee ballots from eligible alumni must be received in NAA mailbox or postmarked no later than _____	
Ballots are mailed to qualified requestors/alumni	
Ballots are returned to CPA firm with a postmark no later than _____	
Ballots will be tallied by Accounting Firm and Nominations and Elections Committee on Friday at the National Conference	
Election results are announced at beginning of Second Plenary session during National Conference.	
Officers are installed during Awards Banquet Saturday at the National Conference.	

### NOMINATION & ELECTION COMMITTEE MEMBERS

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_, Chair



BETHUNE-COOKMAN UNIVERSITY  
NATIONAL ALUMNI ASSOCIATION

## REQUEST FOR ABSENTEE BALLOT

I will not be attending the Bethune-Cookman University National Alumni Association Conference in June. Please send me an ABSENTEE BALLOT. \*\*\*\*\***PLEASE PRINT**\*\*\*\*\*

NAME\_\_\_\_\_

ADDRESS\_\_\_\_\_

CITY\_\_\_\_\_STATE\_\_\_\_\_ZIP\_\_\_\_\_

EMAIL ADDRESS\_\_\_\_\_

(PLACE X BESIDE THE ONE THAT APPLIES)

LIFE MEMBERSHIP MEMBER\_\_\_\_\_

ANNUAL MEMBERSHIP\_\_\_\_\_

SIGNATURE\_\_\_\_\_DATE\_\_\_\_\_

**P. O. BOX 1899      DAYTONA BEACH, FLORIDA 32115**



BETHUNE-COOKMAN UNIVERSITY  
NATIONAL ALUMNI ASSOCIATION

## ALUMNI AWARD NOMINATION FORM

1. Award Category \_\_\_\_\_
2. Date Submitted \_\_\_\_\_
3. RECOMMENDED AWARD RECIPIENT

Name \_\_\_\_\_ Phone \_\_\_\_\_

Title \_\_\_\_\_

Organization \_\_\_\_\_

Address \_\_\_\_\_

Chapter (if appropriate) \_\_\_\_\_

4. SUBMITTED BY: \_\_\_\_\_

Name \_\_\_\_\_ Phone \_\_\_\_\_

Title \_\_\_\_\_

Organization \_\_\_\_\_

Address \_\_\_\_\_

Chapter Affiliate (if appropriate) \_\_\_\_\_

5. BRIEF SUMMARY OF ACCOMPLISHMENT: \_\_\_\_\_

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**P. O. BOX 1899      DAYTONA BEACH, FLORIDA 32115**



BETHUNE-COOKMAN UNIVERSITY  
NATIONAL ALUMNI ASSOCIATION

## REMITTANCES TO THE NATIONAL ALUMNI ASSOCIATION

Please use this form to forward revenues collected by your chapter to the National Alumni Association.

CHAPTER \_\_\_\_\_ DATE \_\_\_\_\_

TREASURER \_\_\_\_\_

- |                            |              |          |
|----------------------------|--------------|----------|
| 1. National Dues _____     | * @ \$ _____ | \$ _____ |
| 2. Miss Alumni Contest * * |              | \$ _____ |
| 3. Alumni Fund Raisers     |              | \$ _____ |
| 4. Chapter Assessment      |              | \$ _____ |
| 5. Charter Fee             |              | \$ _____ |
| 6. Life Membership         |              | \$ _____ |
| 7. Contributions           |              | \$ _____ |
| 8. Scholarships            |              | \$ _____ |
| 9. Other (explain) _____   |              | \$ _____ |

**TOTAL REMITTANCE \$ \_\_\_\_\_**

Please specify if there are any restrictions on scholarship funds. Otherwise, they will be placed in the General Alumni Scholarship Account under your chapter's name.

Restrictions _____	\$ _____
Unrestricted Scholarship _____	\$ _____
Other Comments _____	\$ _____
<b>*** TOTAL</b>	<b>\$ _____</b>

\* National Dues are due July 1<sup>st</sup> of each year for the ensuing year.

\* \* Miss Alumni contest funds are due two weeks before the National Meeting unless otherwise established.

\* \* \* This amount should not exceed total remittance.

**P. O. BOX 1899 DAYTONA BEACH, FLORIDA 32115**



DATE \_\_\_\_\_

### **CERTIFICATION OF DELEGATES**

The \_\_\_\_\_ Chapter certifies that

Name: \_\_\_\_\_

Year Graduated: \_\_\_\_\_

Is a Member in Good Standing and is recommended for certification as our delegate to the  
\_\_\_\_\_ National Convention. This delegate is authorized to represent the chapter in all  
matter, including voting matters.

\_\_\_\_\_  
Chapter President

**P. O. BOX 1899      DAYTONA BEACH, FLORIDA 32115**



BETHUNE-COOKMAN UNIVERSITY  
NATIONAL ALUMNI ASSOCIATION

**REUNION PRE-REGISTRATION AND REMITTANCE FORM**  
(PLEASE PRINT OR TYPE)

1. NAME \_\_\_\_\_ PHONE (H) \_\_\_\_\_  
(W) \_\_\_\_\_
2. ADDRESS \_\_\_\_\_  
(STREET) (CITY) (STATE) (ZIP)
- 3 Enclosed is my "Wild Cat" Class Assessment for our \_\_\_\_\_ year celebration \$ \_\_\_\_\_ (We are asking for \$ \_\_\_\_\_ dollars)\*
4. Other adult family members and friends (Old Cats) attending at \$ \_\_\_\_\_  
OLD CAT \_\_\_\_\_ \$ \_\_\_\_\_  
(NAME)  
OLD CAT \_\_\_\_\_ \$ \_\_\_\_\_  
(NAME)  
OLD CAT \_\_\_\_\_ \$ \_\_\_\_\_  
(NAME)  
Youth (under 21): Young Cats at \$ \_\_\_\_\_ each.  
Young Cat \_\_\_\_\_ \$ \_\_\_\_\_  
(NAME)  
Young Cat \_\_\_\_\_ \$ \_\_\_\_\_  
(NAME)  
Young Cat \_\_\_\_\_ \$ \_\_\_\_\_  
(NAME)
- TOTAL AMOUNT ENCLOSED \$ \_\_\_\_\_
5. I (we) will be arriving (approximate time and date):  
\_\_\_\_\_
6. We will be staying at (Check one):  
\_\_\_\_\_ Headquarters Hotel \_\_\_\_\_ Other Hotel \_\_\_\_\_ In the City
7. If returned by \_\_\_\_\_ (DATE), reunion class members will receive a T-Shirt, especially designed for our Reunion.

**PLEASE CHECK YOUR SIZE**

\_\_\_\_\_ SMALL \_\_\_\_\_ MEDIUM \_\_\_\_\_ LARGE \_\_\_\_\_ EXTRA LARGE

PLEASE MAIL TO:

**P. O. BOX 1899**

**DAYTONA BEACH, FLORIDA 32115**



**CLASS OF \_\_\_\_\_ REUNION QUESTIONNAIRE**

THIS INFORMATION WILL BE USED FOR REGISTRATION, CLASS HISTORY, AND CLASS REUNION BOOKLET. PLEASE USE THE BACK OF THIS FORM IF ADDITIONAL SPACE IS NEEDED AND INDICATE QUESTIONNAIRE NUMBER.

1. Name \_\_\_\_\_ Phone # hm \_\_\_\_\_  
(Please Print or Type) wk \_\_\_\_\_

2. Address \_\_\_\_\_  
(Street) (City) (State) (Zip)

3. Spouse's Name \_\_\_\_\_ Will Spouse Attend? Yes \_\_\_\_\_  
No \_\_\_\_\_

4. Children's Name(s) 1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_  
4. \_\_\_\_\_  
5. \_\_\_\_\_  
6. \_\_\_\_\_

5. Which of your children will be attending the reunion?  
Please list names and ages.  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. What is your current occupation? \_\_\_\_\_  
\_\_\_\_\_

7. Please give brief description of what you do \_\_\_\_\_  
\_\_\_\_\_

8. Please list other significant jobs held \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**CLASS OF \_\_\_\_\_ REUNION QUESTIONNAIRE**

**Page 2**

9. Please list all academic and honorary degrees and where conferred.

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10. Please list other honors and awards

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11. Date of birth (for future class communications)\_\_\_\_\_

12. Organizations \_\_\_\_\_

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13. Hobbies\_\_\_\_\_

---

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14. Last Book Read \_\_\_\_\_

15. Favorite Song and Artist \_\_\_\_\_

16. Favorite Bethune-Cookman College Story\_\_\_\_\_

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BETHUNE-COOKMAN UNIVERSITY  
NATIONAL ALUMNI ASSOCIATION  
**TRAVEL VOUCHER**

DATE \_\_\_\_\_

RECEIVED FROM: \_\_\_\_\_

PURPOSE FOR TRIP: \_\_\_\_\_

DATE(S): \_\_\_\_\_

DESTINATION: FROM \_\_\_\_\_ TO: \_\_\_\_\_

MODE OF TRAVEL: (CIRCLE ONE) AUTO BUS AIRPLANE

FARE: \$ \_\_\_\_\_

LODGING: \_\_\_\_\_ NIGHTS @ \_\_\_\_\_ TOTAL \$ \_\_\_\_\_

MEALS: \_\_\_\_\_ TOTAL \$ \_\_\_\_\_

OTHER (TAXI, ETC.) \_\_\_\_\_

\_\_\_\_\_ TOTAL \$ \_\_\_\_\_

GRAND TOTAL \$ \_\_\_\_\_

SIGNED: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

\_\_\_\_\_

PLEASE ATTACH ALL RECEIPTS AND MAIL TO:

NATIONAL ALUMNI TREASURER  
NATIONAL ALUMNI OFFICE  
P. O. BOX 1899  
DAYTONA BEACH, FLORIDA 32115

APPROVED BY: \_\_\_\_\_

ISSUED CHECK # \_\_\_\_\_

AMOUNT PAID \_\_\_\_\_ DATE \_\_\_\_\_

**(For National President & individuals authorized for reimbursement by the Board of Directors)**

ORDER NO. \_\_\_\_\_



BETHUNE-COOKMAN UNIVERSITY  
NATIONAL ALUMNI ASSOCIATION

## PURCHASE ORDER

DATE \_\_\_\_\_

TAX EXEMPT NO. \_\_\_\_\_

COMPANY \_\_\_\_\_

ADDRESS \_\_\_\_\_

SHIP TO \_\_\_\_\_

(Name, Address, etc.)

Item No.	Description of Item(s)	Quantity	Unit Price	Total Cost

TOTAL

REQUESTED BY: \_\_\_\_\_

BUDGET CATEGORY: \_\_\_\_\_

APPROVED BY: \_\_\_\_\_, President

\_\_\_\_\_, Treasurer

Issued Check No. \_\_\_\_\_ Amount Paid \$ \_\_\_\_\_ Date Paid \_\_\_\_\_

**P. O. BOX 1899**

**DAYTONA BEACH, FLORIDA 32115**



**BETHUNE-COOKMAN UNIVERSITY  
NATIONAL ALUMNI ASSOCIATION**

POST OFFICE BOX 1899  
DAYTONA BEACH, FLORIDA 32114  
WWW.BCU-NAA.COM

**CHECK REQUISITION FORM**

Check Requisition Form No. \_\_\_\_\_ Date: \_\_\_\_\_

**REQUESTOR INFORMATION**

Vendor Company Name (if applicable): \_\_\_\_\_

Contact Name: \_\_\_\_\_ Title: \_\_\_\_\_

Type of Activity: \_\_\_\_\_

Date(s) of Service: \_\_\_\_\_

**EXPENDITURES**

1. \_\_\_\_\_ \$ \_\_\_\_\_
2. \_\_\_\_\_ \$ \_\_\_\_\_
3. \_\_\_\_\_ \$ \_\_\_\_\_
4. \_\_\_\_\_ \$ \_\_\_\_\_
5. \_\_\_\_\_ \$ \_\_\_\_\_

*Continue on back if more space needed. \*\*Please attach all receipts\*\**

Expenditures from back of this sheet: \$ \_\_\_\_\_

Grand Total: \$ \_\_\_\_\_

**PROCESSING INFORMATION**

Make Check Payable to:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Mail to: Bethune-Cookman University National Alumni Association  
Post Office Box 1899  
Daytona Beach, Florida 32114

**INTERNAL USE ONLY**

Budget Category: \_\_\_\_\_

Approved By: \_\_\_\_\_

Treasurer Approval: \_\_\_\_\_

Issued Check #: \_\_\_\_\_ Date Issued: \_\_\_\_\_ Amount Paid: \_\_\_\_\_

*Note: All expenditures that are not in compliance with the By-Laws will not be honored.*



BETHUNE-COOKMAN UNIVERSITY  
NATIONAL ALUMNI ASSOCIATION

## COMMITTEE/SUBCOMMITTEE REPORT FORM

*I, as chairperson of the following committee of the Bethune-Cookman University National Alumni Association, hereby submit this report of committee activities for \_\_\_\_\_ fiscal year.*

1. Committee Name \_\_\_\_\_
2. Chairperson \_\_\_\_\_
3. Committee Members \_\_\_\_\_
4. Assigned Task(s), Duties or Responsibilities \_\_\_\_\_  
\_\_\_\_\_
5. Meeting/Conferencing date(s) \_\_\_\_\_
6. Participants \_\_\_\_\_
7. Item/Issues Discussed \_\_\_\_\_
8. Decisions Made/Actions Taken \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
9. Unresolved Issues/Unfinished business \_\_\_\_\_  
\_\_\_\_\_
10. Recommendation(s) \_\_\_\_\_  
\_\_\_\_\_
11. Other Comments (use reverse side if necessary) \_\_\_\_\_  
\_\_\_\_\_

***Note: If there are assignments, projects or tasks that you had for the fiscal year, indicate them on line 4 above. If none, write "NONE" on line 4 and skip to line 10 and 11, if there are suggestions for the future. Meetings can be held in person or via teleconferences. Chairpersons are responsible for recruiting their committee members. Present or email this form to the Recording Secretary.***

**Chairperson Signature** \_\_\_\_\_ **Date** \_\_\_\_\_



## CONSTITUTION AND BY-LAWS COMMITTEE PROPOSED AMENDMENTS TO BY-LAWS

PRESENT BY-LAW	PROPOSED AMENDMENT RECOMMENDED CHANGE

NATIONAL ALUMNI DIRECTORS  
(EXECUTIVE SECRETARIES)  
OF THE NATIONAL ALUMNI ASSOCIATION

Mr. Lucious Davis

Dr. James Huger

Dr. Carver Portlock

Dr. James Keyes

Reverend Julius Kidd

Ms. Pat Tomlin

Ms. Brenda Moore

Dr. Roberto Barragan

Mrs. Pinkie Oliver

Ms. Patrica James

Mrs. Sharon Bostick-Isaac

Ms. Marah Beltz



## NATIONAL ALUMNI PRESIDENTS AND THEIR CONVENTIONS

YEAR	NAME	CONVENTION AND LOCATION
1932-36	E. R. Rodriguez Daytona Beach, FL	General Alumni Association Meeting Daytona Beach, Florida
1948-50	G. D. Rogers, Jr. Tampa, Florida	General Alumni Assoc. Meeting Daytona Beach, Florida
1950-51	Rev. Harold B. Whitehurst Sanford, Florida	General Alumni Association Meeting Daytona Beach, Florida
1951-56	Attorney Horace Hill Daytona Beach, Florida	General Alumni Association Meeting Daytona Beach, Florida
1956-60	Dr. Willie J. Wright, Sr. Miami, Florida	General Alumni Association Meeting Daytona Beach, Florida
1960-64	Mr. John S. Frink Daytona Beach, Florida	General Alumni Association Meeting Daytona Beach, Florida
1964-68	Mr. Harry L. Burney, Jr. Crescent City, Florida	General Alumni Association Meeting Daytona Beach, Florida
1968	Dr. Johnny L. Jones Miami, Florida	General Alumni Assoc. Meeting Daytona Beach, Florida
1969	Dr. Johnny L. Jones Miami, Florida	1 <sup>st</sup> National Alumni Convention Washington, D.C.
1970	Dr. Johnny L. Jones Miami, Florida	2 <sup>nd</sup> National Alumni Convention New York City, New York
1971	Dr. Johnny L. Jones Miami, Florida	3 <sup>rd</sup> National Alumni Convention Philadelphia, Pennsylvania
1972	Dr. Johnny L. Jones Miami, Florida	4 <sup>th</sup> National Alumni Convention Daytona Beach, Florida
1973	Dr. Stafford Ferguson West Palm Beach, FL.	5 <sup>th</sup> National Alumni Convention Miami, Florida

1974	Dr. Stafford Ferguson West Palm Beach, FL.	6 <sup>th</sup> National Alumni Convention Atlanta, GA.
1975	Dr. Stafford Ferguson West Palm Beach, FL.	7 <sup>th</sup> National Alumni Convention West Palm Beach, Florida
1976	Dr. Stafford Ferguson West Palm Beach, FL.	8 <sup>th</sup> National Alumni Convention Jacksonville, Florida?
1977	Dr. John Hamilton New York City, NY	9 <sup>th</sup> National Alumni Convention St. Petersburg, Florida
1978	Dr. John Hamilton New York City, NY	10 <sup>th</sup> National Alumni Convention West Palm Beach, Florida
1979	Dr. John Hamilton New York City, NY	11 <sup>th</sup> National Alumni Convention Philadelphia, Pennsylvania
1980	Dr. John Hamilton New York City, NY	12 <sup>th</sup> National Alumni Convention Pensacola, Florida
1981	Dr. James Keys Miami, Florida	13 <sup>th</sup> National Alumni Convention Daytona Beach, Florida
1982	Dr. James Keys Miami, Florida	14 <sup>th</sup> National Alumni Convention Daytona Beach, Florida
1983	Dr. A. Portlock Philadelphia, PA.	15 <sup>th</sup> National Alumni Convention Miami, Florida
1984	Dr. A. Portlock Philadelphia, PA.	16 <sup>th</sup> National Alumni Convention New York City, New York
1985	Attorney Morris Milton St. Petersburg, Florida	17 <sup>th</sup> National Alumni Convention Daytona Beach, Florida
1986	Attorney Morris Milton St. Petersburg, Florida (Deceased in Office)	18 <sup>th</sup> National Alumni Convention Philadelphia, Pennsylvania
1987	Dr. Richard Strachan Miami, Florida	19 <sup>th</sup> National Alumni Convention Miami, Florida/Nassau, Bahamas
1988	Dr. Richard Strachan Miami, Florida	20 <sup>th</sup> National Alumni Convention Washington, D.C.

1989	Rev. Julius H. Kidd Atlanta, Georgia	21 <sup>th</sup> National Alumni Convention Daytona Beach, Florida
1990	Rev. Julius H. Kidd Atlanta, Georgia	22 <sup>th</sup> National Alumni Convention Daytona Beach, FL. (Broward County)
1991	Rev. Julius H. Kidd Atlanta, Georgia	23 <sup>th</sup> National Alumni Convention Pensacola, Florida
1992	Rev. Julius H. Kidd Atlanta, Georgia	24 <sup>th</sup> National Alumni Convention Dallas/Ft. Worth, Texas
1993	Dr. Robert Williams Daytona Beach, Florida	25 <sup>th</sup> National Alumni Convention Daytona beach, Florida
1994	Dr. Robert Williams Daytona Beach, Florida	26 <sup>th</sup> National Alumni Convention Miami Florida /Nassau, Bahamas
1995	Dr. Robert Williams Daytona Beach, Florida	27 <sup>th</sup> National Alumni Convention Washington, D.C.
1996	Dr. Robert Williams Daytona Beach, Florida	28 <sup>th</sup> National Alumni Convention West Palm Beach, Florida
1997	Mr. John H. Williams Miami, Florida	29 <sup>th</sup> National Alumni Convention Daytona Beach, Florida
1998	Mr. John H. Williams Miami, Florida	30 <sup>th</sup> National Alumni Convention Orlando, Florida
1999	Mr. John H. Williams Miami, Florida	31 <sup>st</sup> National Alumni Convention Tampa, Florida
2000	Mr. John H. Williams Miami, Florida	32 <sup>nd</sup> National Alumni Convention Jacksonville, Florida
2001	Ms. Myrtle Brown New York, NY	33 <sup>rd</sup> National Alumni Convention Daytona Beach, Florida
2002	Ms. Myrtle Brown New York, NY	34 <sup>th</sup> National Alumni Convention Atlanta, Georgia
2003	Ms. Myrtle Brown Charlotte, NC.	35 <sup>th</sup> National Alumni Convention Miami, Florida

2004	Ms. Myrtle Brown Charlotte, NC	36 <sup>th</sup> National Alumni Convention Daytona Beach, Florida
2005	Ms. Jacqueline Mongal Daytona Beach, FL	37 <sup>th</sup> National Alumni Convention Tampa, Florida
2006	Ms. Jacqueline Mongal Daytona Beach, FL	38 <sup>th</sup> National Alumni Convention Orlando, Florida
2007	Ms. Jacqueline Mongal Daytona Beach, FL	39 <sup>th</sup> National Alumni Convention Tallahassee, Florida
2008	Ms. Jacqueline Mongal Daytona Beach, FL	40 <sup>th</sup> National Alumni Convention Daytona Beach, Florida
2009	Mrs. Evelyn Walker Pensacola, FL	41 <sup>st</sup> National Alumni Convention West Palm Beach, FL
2010	Mrs. Evelyn Walker Pensacola, FL	42 <sup>nd</sup> National Alumni Convention Jacksonville, FL
2011	Mr. A. Ray Brinson Jacksonville, FL	43 <sup>rd</sup> National Alumni Convention Nassau, Bahamas
2012	Mr. A. Ray Brinson Jacksonville, FL	44 <sup>th</sup> National Alumni Convention Daytona Beach, FL
2013	Mr. A. Ray Brinson Jacksonville, FL	45 <sup>th</sup> National Alumni Convention Tampa, FL
2014	Mr. A. Ray Brinson Jacksonville, FL	46 <sup>th</sup> National Alumni Convention Washington, DC

# NATIONAL ALUMNI ASSOCIATION MS. ALUMNI HANDBOOK



Printed 1998  
Revised 2002, 2007

July 20, 1998

Dear Alumnus:

Following are guidelines and information for the Ms. Alumni Contest. They were approved by the Board of Directors and adopted by the General Assembly during our 30<sup>th</sup> National Convention. Contestants, participants, and chapter presidents should become familiar with the contents of this manual and consult the B-CC Alumni Office at 1-888-BETUNE if there are questions. One copy is for the chapter president and one is for the chapter's contestant.

Many thanks to Ms. Alumni Contest Chairperson 1996-2001, **Ms. Annie Pearl Hill**, for her assistance in putting this manual together. Her prodding, proof reading and tireless effort made this possible. She, **Ms. Evelyn Walker**, who preceded her as Chairperson and coordinator of the coronation for many years, **Ms. Lee Bryan** and **Ms. Lucretia McBride** who both served as Co-chairs over the years and lent their expertise in coordinating the pageantry and choreography of the coronations, along with the other committee members, have moved the contest to a new level of excellence.

**Chapter presidents are asked to complete and return the Ms. Alumni Contestant Profile Sheet on page 9 to the National Office immediately after identifying their contestant.**

We thank each contestant and each chapter for their participation in our contest. Your support and participation help the National Alumni Association to maximize its financial contribution to Bethune-Cookman College.

Sincerely,

John H. Williams  
National President (1996-2000)

## **I. PURPOSE**

The purpose of the National Alumni Association's Ms. Alumni Contest is to:

- Provide financial support to Bethune-Cookman University through the fund raising efforts of local alumni chapters participating in this activity.
- Crown a National Alumni Queen.
- Provide opportunities to showcase alumni involvement in the institution by entering the National Queen in the Homecoming Parade and presenting her at Pre-game or half-time during the Homecoming football game.
- Create an interest in getting recent graduates involved in local chapters.

## II. HISTORY

The Ms. Alumni Contest has been a major fund raising project for the National Alumni Association since the early 1950's. The National Alumni Association realized the need to generate funds for the institution and therefore sought various means to accomplish the objectives. The Ms. Alumni Contest has been one of the major and more successful fund raising efforts used to meet the objective. All chapters are encouraged to participate in this effort. Therefore, a national queen is crowned annually at the National Convention from a pool of contestants competing financially for the title. The contestant from the local chapter level who generates the largest amount of money for the activity is crowned Ms. Alumni.

## III. ELIGIBILITY

To compete in the Ms. Alumni Contest the contestant:

- must be a financial member of the local chapter and National Alumni Association as stated in the organization's by-laws,
- must also be willing to generate funds to compete on the national level,
- must obtain and submit at least three pages of ads for the convention souvenir booklet, and
- Must submit a minimum of \$100.00 to be declared a winner and to be eligible for the awards

The chapters are ranked in three levels according to chapter assessment.

The national queens will be crowned from the top fundraisers from the three pools of contestants for the following titles with one queen coming from each of the three levels:

- **Ms. Alumni** will be the contestant with the highest amount raised over \$2,000 among the top fundraisers from each of the three levels.
- **Ms. Gold** will be the contestant with the second highest amount raised over \$1,000 among those three winners.
- **Ms. Maroon** will be the contestant with the third highest amount raised over \$1,000 among those three winners.

- If there are only two pools of contestants raising over \$1,000, Ms. Maroon will be the second runner-up from the two pools who raises the greatest amount of money over \$1,000.
- If there is only one pool of contestants raising over \$1,000, the three winners will be selected from that one group.

#### **THE THREE ALUMNI CHAPTER ASSESSMENT LEVELS ARE:**

##### **LARGE (\$5,000)**

Broward County  
Duval/Nassau  
Hillsborough County  
Miami/Dade  
New York  
Orange County  
Palm Beach County  
Volusia County

##### **MEDIUM (\$1,000)**

Alachua County  
Atlanta, Chapter  
Big Bend  
Escambia County  
Delaware Valley  
Polk County  
Washington, DC

##### **SMALL (\$500)**

Brevard County  
Georgia Chapter  
Ft. Pierce  
Lake/Sumter  
Osceola  
Pinellas  
Seminole  
St. Lucie  
Others

#### **IV. PROCEDURES**

- Each chapter may permit as many entries on the local level as desired. However, a run off must be conducted to determine the winner who will compete on the national level.
- Only **ONE** contestant from each chapter **WILL BE PERMITTED TO COMPETE** in the national level competition. Second and third place winners at the local level are welcomed to participate in the coronation activities, as space may permit, but not as contestants for the Ms. Alumni title.
- Chapters not competing in the contest are encouraged to make a contribution toward this effort. If so, a representative from the chapter may participate in the coronation and will be recognized as the chapter representative.
- As per Article XV, Section 1-d of the By Laws, local chapters are responsible for the travel expenses for their Ms. Alumni contestant and/or representatives.
- All donations/contributions must be made payable to the National Alumni Association of B-CU and mailed to P.O. Box 1899, Daytona Beach, Florida 32115 and post marked prior to the deadline. Monies received with a postmark after the deadline will not count toward the current contest but will be credited to the chapter as a donation.
- In the national competition the contestant generating and reporting the largest amount of money above \$1,000.00 in its group size (i.e., among the large chapters, medium size chapters, or small chapters as designated in the Chapter Assessment document) will compete against the top fundraisers in the other two groups with the contestant reporting



the highest amount of money being crowned Ms. Alumni, the next highest fundraiser coming from one of the other two groups being crowned Ms. Gold and the third highest fundraiser coming from the third group being crowned Ms. Maroon. Therefore, Ms. Alumni, Ms. Gold and Ms. Maroon will each come from a different size group, i.e., large chapters, medium size chapters or small size chapters. If ever there is no contestant in one of the three groups, Ms. Maroon will be the top fundraiser from the two runner-ups.

- The Queen's reign with her crowning at the National Alumni Convention and continues to the new crowning at the next convention.

## **V. AWARDS**

Ms. Alumni Committee Chairperson(s) and the Treasurer shall be responsible for seeing that these guidelines are fulfilled.

### **MS. ALUMNI WILL RECEIVE:**

- A plaque/trophy
- Flowers:
  - Bouquet for the coronation at the convention
  - Corsage for the Homecoming parade and game
- \$50.00 toward cost of out-of-county transportation
- Hotel accommodations (arranged by the National) to:
  - Homecoming
  - Florida Classic
  - Annual National Alumni Convention
- Two (2) football game tickets to Homecoming
- Two (2) football game tickets the Florida Classic Game.
- Membership on the Board of Directors of the National Alumni Association.
- A full-page ad in the Annual National Alumni Convention Souvenir Journal.
- Free registration at the following year's national meeting.
- A lapel pin announcing her title

### **MS. GOLD WILL RECEIVE:**

- A plaque/trophy
- Flower(s) during coronation ball
- \$50.00 toward cost of out-of-county transportation
- Hotel accommodations (arranged by the National) to:
  1. Homecoming
  2. Florida Classic
  3. Annual National Alumni Convention
- Two (2) tickets to the Homecoming game
- Two (2) tickets to the Florida Classic game

- Free registration at the following year's national meeting
- Participation in the Homecoming parade
- A lapel pin announcing her title

#### **MS. MAROON WILL RECEIVE:**

- A plaque/trophy
- Flower(s) during coronation ball
- \$50.00 toward cost of out-of-county transportation
- Hotel accommodations (arranged by the National) to:
  1. Homecoming
  2. Florida Classic
  3. Annual National Alumni Convention
- Two (2) tickets to the Homecoming game
- Two (2) tickets to the Florida Classic game
- Free registration at the following year's national meeting
- Participation in the Homecoming parade
- A lapel pin announcing her title

The winners will reign for one year or until the next National Alumni Meeting Coronation. The Ms. Alumni Committee will deliver all prizes and awards to Ms. Alumni and her court at least five days prior to the event (homecoming, Florida Classic and National Meeting). The treasurer will open the envelopes and receipt the money when received. The contest results will be reported at the National Meeting. **Ms. Alumni and her court will turn in their sashes at the end of their reign.**

#### **VI. RESPONSIBILITIES (Chapter Presidents should ensure that contestants and escorts receive a copy of this manual)**

- **The attire for the Pageant is strictly formal.** Rehearsal(s) will be at the convention on Thursday or Friday (time to be announced). Place of rehearsal will be obtained at the conference registration desk.
- Each chapter that makes a contribution and participates in the coronation, whether competing for the title or just representing the chapter, is requested to **provide an escort** for its chapter queen.

Each contestant or representative and escort **must complete a profile sheet** (see page LL) and mail it to The National Alumni Association of B-CU and mailed to P.O. Box 1899, Daytona Beach, Florida 32115, ATTTN: Ms. Alumni Coronation, as soon as possible but prior to June 1, and attend rehearsal(s) on Thursday or Friday during the convention (exact time and day to be announced).

- Ms. Alumni will be expected to:  
**Participate in the Homecoming Parade**

**Be presented during pre-game or half-time at Homecoming  
Participate in the National Alumni Convention's Ms. Alumni  
Coronation.**

**VII. Former Ms. Alumni King and Queens**

1955-56	Ernestine Walker Williams Alachua County Chapter
1956-57	Theodora Jackson-White Palm Beach Chapter (Washington, D.C.)
1968-69	Ernestine Jackson Harris Palm Beach County Chapter
1969-70	Dr. Charlotte Ford Clark Miami-Dade County
1970-71	Clementine Davis Butler Palm Beach County Chapter (Rivera Bch)
1971-72	
1972-73	
1973-74	
1974-75	Edith Coleman Bush Palm Beach County Chapter
1975-76	
1976-77	
1977-78	Margaret Dixon Cakuma Palm Beach County Chapter
1978-79	*Barbara Johnson Delaware Valley Chapter
1980-81	*Charles & Elizabeth-Stubbs Munnings Palm Beach County Chapter
1981-82	Elizabeth-Stubbs Munnings Palm Beach County Chapter

1982-83	
1983-84	*Vertie McWilliams Barrett Lake City Chapter
1984-85	
1985-86	*Constance A. Oliver Volusia County Chapter
1986-87	*Valarie N. Pouncy Volusia County Chapter
1987-88	*C. Nadyne Zow Young New York Chapter
1988-89	*Vivian Caldwell Harris Miami-Dade County Chapter
1989-90	*Cilla Schoefield Orange County Chapter
1990-91	Brenda Hawkes Miami-Dade County Chapter (Pembroke Pines)
1991-92	Leila O. Purcell Volusia County Chapter
1992-93	Annie Pearl Smith - Hill Palm Beach County (Belle Glade)
1993-94	Tammy Thomas-Anthony Palm Beach County Chapter (West Palm Beach)
1994-95	Helen Wright Young Hillsborough County (Tampa)
1995-96	Myrtle Burrell Brown New York, New York County Chapter
1996-97	Sheila Washington Miami-Dade County Chapter
1997-98	Betoria Watson Hillsborough County (Tampa)

1998-99	Iona Gamble Palm Beach County Chapter
1999-2000	Regina Harrison Orange County Chapter
2000-2001	Gina Petty Sanders Hillsborough County (Tampa)
2001-2002	Latisa L. Williams Miami-Dade County Chapter
2002-2003	Sarah Lawrence Palm Beach County Chapter
2003-2004	Carolyn Martin Volusia County Chapter
2004-2005	Marilyn Jordan Volusia County Chapter
2005-2006	Lanita Parrish Palm Beach County Chapter
2006-2007	Christie Jacobs Hillsborough County Chapter
2007-2008	Robin Moncur Miami-Dade Chapter
2008-2009	Michelle Carter-Scott Volusia County Chapter
2009-2010	Rose Roland Volusia County Chapter
2010-2011	Kimberly A. Simmons Palm Beach County
2011-2012	West Palm County
2012-2013	Raquel Watson Hillsborough County

2013-2014 Sylvia Howard Gibson  
Palm Beach County

2014-2015 Iona Gamble  
Palm Beach Chapter

\*Indicates deceased

We are asking chapter presidents and alumni to assist us in updating our records by informing Ms. Alumni Chairperson of any former Ms. Alumni whom you are aware of, which is not included above. Send any omissions or deletions to:

The National Alumni Association of B-CU  
P.O. Box 1899  
Daytona Beach, Florida 32115

**MS. ALUMNI CONTEST  
CONTESTANT PROFILE SHEET**

Name \_\_\_\_\_ Date \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_ Wk No. \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Email \_\_\_\_\_ Fax \_\_\_\_\_

Year Graduated \_\_\_\_\_ Degree \_\_\_\_\_

Major \_\_\_\_\_

Advanced Degree(s) \_\_\_\_\_

Honorary Degree(s) \_\_\_\_\_

Professional Organizations \_\_\_\_\_

\_\_\_\_\_

Hobbies \_\_\_\_\_ Honors/Awards \_\_\_\_\_

Other Affiliations \_\_\_\_\_

Greek Letter Affiliation \_\_\_\_\_

Chapter \_\_\_\_\_

Family information (Husband & number of children) \_\_\_\_\_

Life's Motto \_\_\_\_\_

Place of Employment \_\_\_\_\_

Occupation/Position \_\_\_\_\_

Name to appear on plaque \_\_\_\_\_

Name of Escort \_\_\_\_\_ Profession \_\_\_\_\_

Additional information regarding escort \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

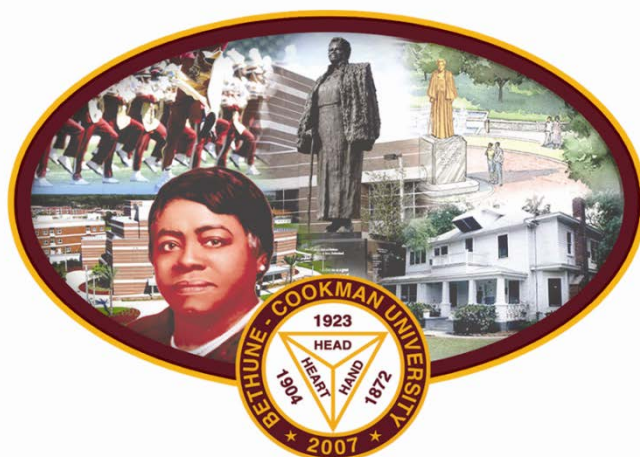
MAIL PROFILE SHEET AND PHOTO ON OR BEFORE MAY 1, BUT NO LATER THAN  
JUNE 1, TO:

ATTENTION: MS. ALUMNI CONTESTANT PROFILE SHEET  
The National Alumni Association of B-CU  
P.O. Box 1899  
Daytona Beach, Florida 32115

Updated 2007:  
Annie Pearl Hill, Committee Chairperson  
LuCretia A. McBride, Co-Chairperson  
Jacqueline Mongal, National President



# Financial Procedures Manual



BETHUNE-COOKMAN UNIVERSITY  
NATIONAL ALUMNI ASSOCIATION

2010 - 2011

January 13, 2011

*Updated 12/12/12*

Alumni of B-CU:

This Manual of Financial Procedures is designed to formalize and place in writing the procedures and system utilized in managing the finances of this organization. We want to thank the individuals named below for their contributions and assistance over the years in instituting the policies, practices and procedures detailed in this manual. Procedures and policies covered involve the following:

- **Finance Procedures** – Our system utilized for financial record keeping, disbursements, fundraising, credit card transactions, Pay Pal Transactions, paying of bills, and other related activities associated with the control of finances.
- **Chapter Assessments** – Our system for setting minimum fundraising goals for each chapter with the intent of establishing and planning National Alumni Association budget and expenditures.
- **Chapter Evaluations** – our system for evaluating the effectiveness of chapter operations with the aim of providing feedback to the chapters for their improvement.

These procedures are designed for the benefit of the Association and will be amended, updated and/or revised as the need arises. Suggestions for improvement should be submitted to the Budget and Finance Committee for consideration.

John H. Williams, Chairman  
Budget and Finance Committee

#### **COMMITTEE MEMBERS**

Jacqueline Mongal  
Cathy Washington  
Carolyn Martin  
Lee Bryan  
Gleandeal Johnson  
Essie Smith  
John Williams

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## **I. NAA FINANCIAL PROCEDURES**

### **A. DONATIONS & INCOME**

1. **INCOMING MAIL PROCEDURES:** All incoming NAA written correspondences and income should be mailed to the NAA mailbox. Incoming funds from the P. O. Box are recorded in a “Mail or Currency Log” by the Corresponding Secretary who then turns them over to the Treasurer for recording and depositing in the Bank Account. A copy of the documents and details are transmitted to the Financial Secretary for her records. The Financial Secretary emails a Receipt/Letter of Acknowledgement to the donor thanking him/her for the donation within one week of receiving the funds.
2. **RECEIPTS:** The Treasurer gives or faxes a signed written receipt to the Financial Secretary showing the amount of money received with the date of the receipt along with a copy of the bank receipt.
3. **BANK TRANSACTIONS:** Deposits, withdrawals and other transactions with the bank are handled by the Treasurer.
4. **LIFE MEMBERSHIP WELCOME:** The Treasurer emails or faxes copy of Life Membership documents to the Life Membership Chairperson who sends a welcome letter to the new Life Member or Thank You letter for Subscribing payments..
5. **RECEIPTS:** For other incoming funds, a signed written receipt, pre-numbered tickets, or sale item is given to the donor in exchange for donations, admissions or other items being sold.
6. **PAYMENT BY CHECK:** In order to leave an audit trail, payments and other financial transactions shall be by checks, where possible. Cash transactions are discouraged.
7. **CONFERENCE CASH ADVANCE:** Profits accrued from hosting the annual conference is returned to the NAA the following year as part of the host chapter’s assessment donation.
8. **CONFLICT OF INTEREST/NEPOTISM POLICY:** Acts by members or employees that constitute a conflict of interest wherein the interest of the member or employee negatively impacts the interest or the motivation to act in the interest of the NAA is prohibited. Nepotism, to include patronage or favoritism that is bestowed based on family relationship, is prohibited. Activities and/or acts that can be construed as constituting a Conflict of Interest or Nepotism shall be subjected to acceptance or rejection by the Executive Committee. A super majority (¾ positive) vote is required for acceptance.

## **B. PAY PAL RECEIPTS**

1. The Pay Pal Company receives the order on line, processes the payment and transfers the funds into our online Pay Pal Account.
2. The Treasurer, who is continuously monitoring our online Pay Pal Account for receipt of funds, directs Pay Pal to transfer the funds into our designated Bank Account.
3. Pay Pal transfers the funds into our Bank Account and emails a notice to our [info@bcu-naa.com](mailto:info@bcu-naa.com) email account.
4. The Corresponding Secretary (who constantly monitors the email account), copies and saves the Pay Pal notice of the bank credit, records it in the NAA Mail Log and emails or mails a **receipt** or **Letter of Acknowledgement** to the payer.

## **C. CREDIT CARD PROCEDURE**

1. The credit card payment is received by the Corresponding Secretary either by mail at the NAA P. O. Box or by email on the NAA website.
2. The Corresponding Secretary records receipt of the credit card payment in the **NAA Mail Log**.
3. The Corresponding Secretary emails or mails a **receipt** or **Letter of Acknowledgement** to the sender.
4. The Corresponding Secretary mails the credit card charge form to the Treasurer for processing.
5. The Treasurer (or designee) calls the customer to obtain any additional needed information (e.g., security code), processes the credit order and sends it to the Pay Pal Company so that the payer's card can be charged.
6. The Pay Pal Company processes the payment and transfers the funds into our online Pay Pal Account.
7. The Treasurer, who continuously monitors our online Pay Pal Account for receipt of funds, directs Pay Pal to transfer the funds into our designated Bank Account.
8. Pay Pal transfers the funds into our Bank Account and emails a notice to our [info@bcu-naa.com](mailto:info@bcu-naa.com) email account.
9. The Corresponding Secretary, who constantly monitors the email account, copies and saves the Pay Pal notice of the bank credit, records it in the NAA Mail Log and emails or mails a **receipt** or **Letter of Acknowledgement** to the payer.
10. **CREDIT CARD PAYMENTS:** To facilitate our audit process, whenever possible NAA bills should be paid by check. Credit card payments and purchases should be used sparingly and only when a check is not readily available or convenient.
11. **CREDIT CARD LIMITS:** An upper limit of five hundred dollars (\$500.00) is established for credit card purchases.

## **D. DISBURSEMENTS**

1. The Treasurer writes and signs the Disbursement Voucher (Check Payment Requisition) after receiving the invoice from the vendor or National President.

2. The invoice is attached to the voucher and, after signing it to verify availability of funds, the Treasurer faxes or emails them to the President and Financial Secretary for signature and filing. The check is then prepared, signed and mailed to the vendor with a copy being faxed to the Financial Secretary. A small supply of checks can be pre-signed by the Financial Secretary to cover expenditures under \$2,000.00.
3. For routine, recurring monthly bills (utilities, security, etc.), documentation can be attached after payment is made.
4. The Treasurer signs the Disbursement Voucher, writes the check and makes a copy of the check on the bottom of the voucher (or just attaches a copy of the check to the voucher and invoice) saving the package as documentation for later filing in that's month file folder in the Alumni Center.
5. A copy of the month's bank statement is included in the month's file folder in the Alumni Center for future audit purposes.

#### **E. REIMBURSEMENTS AND PAYMENTS**

1. The Budget & Finance Committee is to be consulted prior to the issuing of orders, agreements or contracts requiring NAA payment or compensation for reimbursements or payments over \$100.00 for services rendered.
2. A Performance Agreement or contract should be executed in writing for **services** costing the NAA over \$100.00. This does not include payment of bills and pre-approved money spent on behalf of the organization with receipts as documentation
3. For reimbursement, or return of funds for preauthorized expenditures on behalf of the NAA, the expenses should be pre-authorized by the **President**, his designee, the **Committee Head** or the **Treasurer**.
4. Payment for goods or services rendered, or financial compensation for preauthorized services or products for the NAA, must be pre-authorized by the president..
5. Reimbursements should be only for **legitimate** and **reasonable** NAA expenses.
6. Proper **documentation** should accompany the reimbursement request.
7. Reimbursement request should be made on or attached to an official **NAA Check Requisition Form**.
8. **All outstanding committee-related bills should be collected by the Committee Chairperson and submitted to the Treasurer for processing and reimbursement as soon as possible but within the specified time limit.**
9. Bills and requests for reimbursements, along with documentation, should be submitted within forty-five (45) days of the transaction or event.
10. Reimbursement and/or payment by the Treasurer should be made within two weeks of receipt of required documentation.

#### **F. ADMISSIONS & GATE RECEIPTS**

1. For admission to paid events, raffles and other cash collections, pre-numbered tickets shall be obtained from the treasurer prior to the event with unused tickets being

returned at the conclusion of the event. Funds collected should be reconciled with the number of tickets sold. Individuals collecting cash at the gate shall give the Financial Secretary a signed statement stating the total amount of cash received along with the receipts.

2. For accounting purposes, paying guests to paid events shall be given pre-numbered tickets as they pay. The Financial Secretary shall ensure that money and tickets used are counted and reconciled as soon as possible in a safe and secure area before turning the money over to the Treasurer for depositing.

#### **G. RECORD KEEPING**

1. Utilizing financial data received from the Treasurer and Corresponding Secretary, the Chairperson of the Budget and Finance Committee or designee shall compile a Financial Report or Currency Log detailing all income and expenditures by date, source, purpose and category of each fiscal year on an annual basis.
2. Written copies of each year's financial records (Treasurer's report, Financial Secretary's records, Budget, and Financial Report/Currency Log) shall be filed in the Alumni Center at the end of each fiscal year in a locked cabinet (or room).
3. All NAA records, secretarial and financial, shall be maintained for a period of not less than ten (10) years.
4. The Treasurer and Financial Secretary shall get together (telephone or in person) at least a week prior to each Board of Directors (BOD) meeting and National Conference to update and reconcile records, budgets and financial reports.
5. The National President shall be presented financial balances and updated with a summary of financial transactions monthly so that informed administrative decisions can be made in a timely manner in the best interest of the Association.
6. The National President shall be kept abreast of important financial matters by the Treasurer, Financial Secretary and BFC in a timely manner.
7. Donations received shall be acknowledged by an emailed **Letter of Acknowledgement** and/or a mailed receipt and thank you letter as described in # 1 above **and** deposited within 14 days of receipt. A Copy of the acknowledgement document shall be filed in the Alumni Center along with the monthly statements.

#### **H. FINANCIAL SECRETARY**

1. The Financial Secretary, with input from the President and Budget and Finance Committee, prepares and maintains the NAA annual budget showing projected and actual data.
2. Presents the budget at each BOD meeting, Executive Committee Meeting and General Assembly of the National Conference.
3. Receives correspondence of all incoming monies from the Corresponding Secretary; who submits actual checks to Treasurer for deposit.
4. Maintains a record of all incoming monies for assisting Treasurer with NAA annual State and Federal filing and audits.
5. Maintain an ongoing log/cumulative record (see appendix) of Accounts Receivables with reminder bills/invoice being sent to the responsible individuals in a timely



manner and a report being presented to the Executive Committee at the end of each year detailing outstanding accounts. The log is to be turned over to the new Financial Secretary upon change of officers.

6. In order to keep separate the Treasurer and Financial Secretary functions and to maintain a check-and-balance system, the Corresponding Secretary serves as back-up to the Financial Secretary.

## **I. TREASURER**

1. The Treasurer presents a Treasurer's Report showing a summary of each category of receipts (account balances) and expenditures details, along with Life Membership Account balances, bank deposits and balances at each BOD meeting and at the Executive Committee Meeting and General Assembly of the National Conference.
2. The Treasurer processes Accounts Payables on a biweekly to monthly basis keeping the Association current with all financial obligations. A report is given to the Executive Committee at the end of each year detailing and explaining all outstanding accounts unpaid for more than one month.
3. The Treasurer shall supervise the filing of all federal and state forms by the annual deadline date:
  - IRS tax forms (Form 990 with schedules & 1099)—November 15<sup>th</sup>
  - State of Florida Solicitation of Contribution form---March 5<sup>th</sup>
  - State of Florida Department of Corporations annual Certificate of States filing---March 5<sup>th</sup> (\$400.00 fine if received after May 1<sup>st</sup>)
4. In order to keep separate the Treasurer and Financial Secretary functions and to maintain a check-and-balance system, the Corresponding Secretary serves as back-up to the Treasurer.

## **J. BUDGET AND FINANCE COMMITTEE**

1. **NAA ANNUAL BUDGET:** The Budget and Finance Committee (BFC) produces and presents an annual budget to the National President for inspection and feedback at least one week prior to the Fall BOD meeting. The Financial Secretary, or designee, presents the Budget to the BOD for approval at the Fall BOD meeting.
2. **BUDGET UPDATE:** The BFC presents the updated budget showing expenditures to date, with suggested modifications if necessary, to the National President for inspection and feedback two weeks prior to the Spring BOD meeting. If there are updates to the budget, the Financial Secretary, or designee, presents the updated budget to the BOD for approval at the Spring BOD meeting.
3. **REVIEW OF FINANCIAL PROCEDURES:** The BFC reviews the current financial procedures at the National Conference and suggests changes/revisions to the President and Executive Committee, if warranted.
4. **NAA INTERNAL AUDIT:** The Audit Committee shall perform an internal audit of all financial records and related accounts (Pay Pal, Credit Cards) prior to each National Conference and report the findings at the National Conference.

5. **CHAPTER AUDITS:** Since all chapters operate under the umbrella of the National Alumni Association 501(C)(3) status, the NAA Audit Committee will audit selected chapters' financial records on a rotating basis each year to stay in compliance with Internal Revenue Service regulations regarding non-profit organizations.
6. **EXTERNAL AUDIT:** The BFC obtains an external audit by a qualified auditor every two years.
7. **BUDGET & FINANCE COMMITTEE COMPOSITION:** The Vice President, Treasurer, Financial Secretary, Parliamentarian and other presidential appointee(s) shall serve on the Budget and Finance Committee.

## **K. CONTRACTS**

1. A written **Performance Agreement Form** setting the terms and conditions of a fee-based job assignment must be structured by the Treasurer and/or President with the vendor and approved by the Executive Committee (BFC if \$1,000.00 or less) before work is begun and payment is authorized on small (less than \$5,000.00) jobs.
2. A **Contract** between the NAA and vendor must be structured by the **Contract Committee/BFC** and approved by the BOD for all major assignments/agreements/jobs of more than \$5,000.00.
3. **IRS Form 1099** - Miscellaneous Income Tax Form, shall be issued to vendors who are paid over \$600.00 during any fiscal year by January 30<sup>th</sup> of the following year.
4. **FORM W-9:** In compliance with IRS rules and regulations, vendors or companies providing services or doing work for the NAA with the possibility of receiving \$600.00 or more in remuneration during the fiscal year must complete and provide the NAA Treasurer with a Form W-9, Request for Taxpayer Identification Number (TIP), containing their Federal Employee Identification Number (FEIN) or Social Security number so as to be issued a Form 1099 for tax purposes. All prospective employees shall be informed of this in writing (see appendix) and be in compliance prior to performing work and being paid.
5. **IRS FORM 990:** IRS Form 990 and the accompanying schedules shall be completed by the deadline date (November 1) following each fiscal year.

## **L. NATIONAL CONFERENCE PROCEDURES**

1. **Recycle of Conference seed money:** We advance a \$1,000 loan to the chapter hosting the National Conference at the time we receive the reimbursement from the previous host chapter.

Dear President \_\_\_\_\_:

Enclosed is the \$1,000.00 advance seed money to be used as needed in the preparations for the \_\_\_\_\_ National Conference. **The seed money is issued to the conference host chapter each year as a loan and should be returned within one month of the conclusion of the conference so that it can be issued to the next host chapter.**

If there are questions, please call National President \_\_\_\_\_ at \_\_\_\_\_.

2. **Conference Profits:** Profits accrued from hosting the annual conference is returned to the NAA the following year as part of the host chapter's assessment donation (or Ms. Alumni Contest contribution).

#### **M. TAX EXEMPT STATUS**

1. **TAX EXEMPT STATUS:** In the B-CU alumni association, only the National Alumni Association is authorized to hold tax exempt status, 501(c)(3) designation and a Federal Tax ID number. Member chapters operate under the National's 501(c)(3) and tax exempt status and should submit an annual financial report to the NAA accounting for all income, expenditures and account balances. Permission should be obtained from the NAA prior to using the association's tax identification number.
2. **FEDERAL & STATE FILINGS:** The National Alumni Association, the parent organization for all member chapters, is responsible for the gathering of data and filing of all state and federal mandated forms (990, 1099, annual reports, etc.).
3. **WITHHOLDING OF FUNDS:** Nonprofit 501(c)(3) tax exempt organizations should not be in the business of accumulating wealth but should operate in pursuit of its mission and goals. Therefore, money raised by the NAA and its member chapters for and in the name of B-CU should be directed to the University in the year in which it is raised.

#### **N. EXPENDITURE LIMITS**

<b>APPROVER</b>	<b>AMOUNT</b>
President	\$0 to \$1,000.00
Executive Committee	\$1,000.01 to \$5,000.00
Board of Directors	\$5,000.01 and above
Credit Card	\$500.00 and under

NATIONAL ALUMNI ASSOCIATION OF  
BETHUNE- COOKMAN UNIVERSITY

**TRAVEL AND BUSINESS EXPENSES POLICY**

**POLICY NUMBER: NAA-091512**

**REVISION DATE: 12/12/12**

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**I. PURPOSE**

To establish and provide travel and business expenditure reimbursement guidelines for reasonable and necessary business expenditures incurred by B-CU NAA agents, while transacting B-CU NAA business. It is the purpose of this policy to describe the types of travel and business expenditures payments can be made using the Bank Debit Card as payment. It is the responsibility of each employee cardholder to insure incurred expenses are reasonable (i.e., neither lavish nor extravagant) and unnecessary.

**II. SCOPE**

These guidelines apply to person who has been issued a Bank Debit Card by the banking institution of B-CU NAA Bank Account. This policy pertains to business travelers (i.e., Board member or agent) whom are required to travel and entertain while transacting business for B-CU NAA, and authorize business expenditures related to B-CU NAA.

**III. RESPONSIBILITY**

The Board has the responsibility of establishing general policy guidelines. The development and administration of this policy is the responsibility of B-CU NAA Executive Committee. The Budget & Finance Committee, as a subcommittee of the Executive Committee, shall oversee the travel and Business procedures and report back to the Executive Committee annually or as needed with status reports recommendations for change when warranted. The Budget and Finance Chairperson and Financial Secretary are responsible for overseeing the policy/guidelines. Approval of expense reports indicates prior review of all expenses submitted for reimbursement by the immediate supervisor or manager, and that all are in compliance with this policy..

It is the responsibility of each Board member, or agent who incurs travel and business expenses on behalf of BCU NAA, and persons designated to make travel arrangements on behalf of others, to be cognizant of this policy to minimize and prevent any misunderstandings or misinterpretations. Reports of noncompliance of these guidelines will be provided to the Board for review and appropriate action.

It is the responsibility of the person incurring travel and business expenses have prior approval based on the budgeted line item and the need for such expenses before it is

incurred and then provide the business expense report(s) including attached original documentation to financial secretary for recording and to the treasurer for their monthly treasurer's report, this will ensure proper planning and compliance in accordance with this policy.

#### IV. EXPENSE GUIDELINES

##### A. General Guidelines

BCU NAA will advance or reimburse travelers for reasonable, allowable expenses incurred on behalf of the organization. Travelers are expected to exercise prudence, discretion and sound business judgment when incurring these expenses. The bank debit/credit card shall be limited to fuel and meal charges. All other charges unless deemed immediately necessary shall follow the preset guidelines of submitting payment through the voucher system.

Typically, the following types of business expenses are reimbursable (subject to policy guidelines):

##### **In Town**

Business meals  
Gratuities

##### **Out of Town**

- Hotel Lodging
- Meals
- Gratuities
- Car rental or other transportation
- Communications (i.e., fax, e-mail, etc.)
- Registration Fees
- Postage / Shipping
- Business related gasoline charges
- Tolls and parking

Expenditures normally not reimbursable and require advance approval are noted below. Such is in accordance with the Tax Reform Act and current guidelines of the ***Internal Revenue Service ("IRS") Code, Publication 463***, and applies to all business-related travelers.

- Sporting / Athletic events
- Theater
- Private residence gatherings
- Membership in or use of social/health club facilities
- Nightclub expenses
- Entertainment
- Promotional expenses (T-shirts, caps, etc.)
- Emergency childcare (baby-sitting services, etc.)
- Personal recognition events

Any business expenditures not specifically addressed in this policy should be clarified with and approved before they are incurred. This will avoid misunderstandings of the policy and will relieve individuals of personal liabilities for expenditures.

## B. Business Meals (Per IRS' Guidelines)

### 1. Criteria

To qualify for reimbursement, the business meal and entertainment expenditure must meet the following criteria:

- A BCU NAA representative must be present during the expenditure.
  - The expenditure must be a bona fide business related and held in an atmosphere conducive to a business transaction.
  - The expenditure must be directly related to or associated with the active conduct of business.
  - The expenditure cannot be lavish or extravagant. Good judgment should be used with respect to the amount spent on meals. .
- Documentation support with **original** receipts must be provided to the treasurer and financial secretary for recording; whether charged on the bank debit/credit card or voucher reimbursement of expense report is submit should include **(a) nature / purpose of the business meal and entertainment (i.e., topic(s)) and (b) the complete names of the parties present to ensure the organization receives all applicable Tax deductions.** Such is in accordance with the Tax Reform Act of 1986 that limits the deductibility of and imposes eligibility tests for business travel and entertainment expenses. Meals and travel that are not directly related to NAA business are not reimbursable.

### 2. Meals - Local

The charging of meals incurred within the business traveler's home base area are generally not reimbursable, even though the meal may be with other BCU NAA or representatives and described as a working discussion.

### 3. Meals – Overnight Travel

While there is no rigid limit on meal reimbursement, the following reasonable guidelines based on the IRS meals and incidental expenses table should be considered when NAA business related and traveling overnight:

Breakfast	\$ 5.00 - \$12.00
Lunch	\$ 8.00 - \$ 15.00
Dinner	\$10.00 - \$ 20.00

*The guideline above is **not** a per diem, and **actual** individual meal expenses ***must be recorded on weekly expense report.*** Reasonableness must be the guideline to meal expenses, and it should also be recognized that some areas are more expensive than*

others and will require larger expenditures. As always, care and prudence must be exercised when incurring expenses.

#### 4. Meals – One Day Travel

BCU NAA will be reimbursed for individual meals, if applicable, when on business trips of a one-day duration (same day departure and return). Only meals while away qualify and should fall within the guidelines stated above for overnight travel.

### C. Personal Automobile and Vehicle Expenses

It is the B-CU NAA President responsibility to drive prudently and safely (i.e., adhering to the general traffic laws, operating the vehicle with a valid driver's license and current automobile insurance, not under the influence of drugs and alcohol, and utilizing seat belts). Use of a personal automobile to conduct business on behalf of B-CU NAA is permissible.

The use of a rental automobile should be used sparingly and with preapproval through our voucher system. The bank debit/credit card shall be utilized for gasoline purchases for business purposes of B-CU NAA. It is the responsibility of the traveler to contact the treasurer and/or financial secretary for availability funds prior to using the debit/credit card. The traveler shall provide the treasurer and financial secretary within (5) business days the original receipts and voucher for reimbursement of travel expenses (see attached), for recording to the financial records of B-CU NAA.

Additionally, the traveler may opt for the current per diem rate of \$50.00 per day for out-of-town trips. This rate allows for all expenses including fuel, oil, depreciation, personal insurance and repairs. This is an option rather than utilize the bank debit/credit card. The traveler shall submit a voucher for reimbursement of travel expenses (see attached), along with the supporting documentation of his/her travels immediately upon their return in order to receive an immediate turn around on direct payment.

The cost of tolls and reasonable parking charges incurred while on BCU NAA business should, included on the report will be reimbursed. Note that parking, speeding or other fines resulting from traffic violations will not be reimbursed by BCU NAA.

Mileage and reimbursable expenses must be itemized on B-CU NAA's Voucher For Reimbursement Travel Expense Form by date, to and from locations, and miles for each trip with said purpose on the corresponding report.

Current practice and policy do not provide for reimbursement for travel expenses for officers or individuals to or from Executive Committee or Board of Directors meetings, except for National Conferences.

### D. Miscellaneous

#### 1. General

Expenses are reimbursed when they are found to be reasonable and directly related to transacting the business of BCU NAA. Meetings or encounters with alumni are not considered business and therefore related expenses are not reimbursable.

## 2. Gratuities

Gratuities paid for services rendered must be reasonable and customary to qualify for reimbursement by BCU NAA. In certain cities, gratuities may be added directly to the meal bill and care should be taken not to “double tip”.

## 3. Office-related Expenses

Supplies, postage, express/overnight mailing and copying expenses for those working from their homes and away from the respective alumni center are appropriate. The bank debit/credit card shall be utilized to pay for such expenses.

All other expenditures are limited and/or unallowable charges to the bank debit/credit. Any expenditure that exceeds maximum value of \$150.00 must submit a voucher for payment, the use of the bank debit/credit card is considered unauthorized for those purchases. A receipt is required for these types of business expense, i.e., florist invoice, equipment, etc. The name and address of the payee, along with the recipient and purpose must be shown.

### E. Personal Travel Expenses

When personal travel is combined with business travel, the cost of the personal travel is the traveler’s responsibility in its entirety. Any savings, which may result in the combining of business and personal travel, is the property of BCU NAA. In no case will BCU NAA reimburse the individual for more than cost if the trip had not combined personal travel. Travel justifications (i.e., air, hotel, car, meal, etc.) are mandatory for Saturday night, weekend stay-over or traveling more than one day prior to the commencing of the business purpose.

### F. Nonreimbursable Expenses

The items listed below are representative of personal and non-reimbursable expenses. This list is not comprehensive and should serve as a guideline. In general, any expense that is not reasonable, prudent or directly related to the conduct of business is not reimbursable.

- Dues for airline travel clubs
- Alcoholic beverages
- Dues or memberships in non-professional clubs
- Commuting to or from work
- Fines
- Hotel services (in-room movies, health facilities, etc.)
- Insurance (baggage, personal accident insurance, rental car collision insurance)
- Newspapers, magazines and periodicals (with the exception of approved trade and industry publications, which should normally be paid through accounts payable)



- Personal expenses (barber and beauty shops, postage, shoe shine, etc.)
- Unexplained expenses (including, but not limited to those on a hotel bill) or amounts in excess of actual expenses.

## V. TRAVEL GUIDELINES & JUSTIFICATIONS

### A. Introduction

This section provides the procedures for making business travel arrangements and defines the responsibilities of the person(s) for reviewing transportation costs of all individuals who incur travel and business expenses on behalf of BCU NAA, and persons designated to make travel arrangements on behalf of others.

***Prior to any travel reservations being made for Florida Classic and Homecoming, a BCU NAA Voucher for Reimbursement of Travel Expenses Form (if applicable) **must be completed** by the traveler for advance payment to the vendor. The business purpose of the trip, cost justification, expected benefits to BCU NAA (if travel is undertaken) and other pertinent information and must be presented and approved by Executive Committee or its designee, prior to using the bank debit/credit card for payment. (i.e., Ms. Alumni and Court).***

### B. Hotel

Hotel accommodations are to be single rooms with a private bath at a reasonable, comfortable and convenient lodging facility. Luxury accommodations or deluxe hotels are rarely justified and cannot be reimbursed unless the business circumstances warrant the expense.

Accommodations BCU Host hotels will be double-occupancy for cost saving measures. ***While there is no rigid limit on hotel rates***, the suggested guideline when traveling in all but very expensive cities is \$61.00 to \$150.00 per night. If the selected hotel rate is not an already negotiated rate (i.e., conference / convention rate), the traveler may choose to stay in a higher-rate room and pay the non-reimbursable excess / difference over the stated high-end range of \$150.00 per night.

### C. Transportation

Car rental authorization is restricted to compact or intermediate class, unless individual circumstances require the use of a larger vehicle. Exceptions to this guideline include groups of three or more and utilizing the vehicle.

Car rental is prohibited unless the nature or location of the destination is required.

All accidents involving rental cars should be reported to the rental agency local authorities as required. Additionally, persons should report the accident to BCU NAA Executive Board Member as soon as possible. A copy of the accident report and bill of repairs, if available, should be attached to the report. If the rental auto is damaged, the rental company should be instructed to submit an invoice for the repairs to Treasurer.

However, if the accident is due to personal negligence or illegal activity, the person will be billed for all damages.

## VI. ADMINISTRATION AND DOCUMENTATION

### A. Documentation

Identified documentation requirements for specific expenditures are:

#### 1. Individual Travel

While incurring expenses on BCU NAA business, **original** receipt documentation **is required** for all expenditures as noted below, including those incurred on BCU NAA's Corporate credit cards. Under no circumstances will reimbursements be made from or based upon the traveler's personal credit card statement(s).

- Lodging charges;
- Auto rentals;
- Meals; and
- Any other expense submitted for reimbursement.

Documentation and/or a written explanation will be required on any item that may be questioned in the expense report.

#### 2. Business Meals and Entertainment

Business meals expenditures require **original** receipt documentation, regardless of the dollar amount (this is a mandatory IRS requirement). Register receipts, restaurant bills, and/or debit/credit card receipts are acceptable. Tear tab receipts are **generally not acceptable**.

Additional documentation will be required on the expense report: date, name, the place of the meal, name and title of person(s) entertained and the company they represent, and the specific business reason for the expenditure. (These are mandatory IRS requirements).

### B. Expense Reports

#### 1. Frequency of Submission

Each business traveler is **required** to submit an expense report following a business assignment or at the end of each weekly reporting period (through Saturday) in which reimbursable expenses were incurred. If out of town for an extended period of time (in excess of one week), arrangements for submission should be discussed with the approving authority.

## 2. Reimbursement

Reimbursements for expenses exceeding 30 days must include a written explanation of the circumstances causing the delay. Requested reimbursement of expenses for which the related expense report and original supporting and required documentation are submitted over 60 days from date expense was incurred is deemed income to the traveler by the IRS and subject to a 1099 Misc Form.

### C. Advances

Advances for travel will be granted for hardship or unusual circumstances to business travelers who incur travel and business expenses on behalf of BCU NAA. Requests for advances, including justification, must be budget approved.

If an advance is granted for a trip or other specific assignment, the unused portion of the advance must be submitted with the expense reports. The full amount of the advance must be recorded on the appropriate section of the expense report as well. The IRS considers any unused portion of a cash advance not returned by the business traveler within 60 days as taxable income.

### D. Errors in Submission

It is the responsibility of the Financial Secretary or his/her designee to deny approval for any expense report that contains errors, lacks proper documentation, is incomplete or is not in compliance with BCU NAA travel and business expense policy. It is the responsibility of the business traveler to correct or complete the expense report promptly and resubmit it for review and recording.

Improperly prepared expense reports received by Treasurer (who receives the original receipts) will be returned to the business traveler for correction and may impact the timeliness of reimbursement.

### E. Review and Audit

The first level of review is the approving authority, which is the person filing the expense report. The approver is responsible for reviewing the expense report for compliance with these guidelines and will be responsible for verifying receipt documentation and expenditure limits, as required by policy.

The expense report is then routed to Treasurer for receipt documentation, validation of mathematical calculations and ensuring compliance with this policy prior to processing for reimbursement.

Finally, Executive Committee, Budget & Finance Committee, Programmatic auditors, and external auditors may occasionally review expense reports for compliance.

## HISTORY OF NAA FINANCIAL ACCOUNTS

Following is a brief history and purpose of the various NAA financial accounts from their beginning to the present. The grand total of all accounts as of June 30, 2013 was **\$420,921.76**.

### **LIFE MEMBERSHIP CLUB/B-CU NATIONAL ALUMNI GENERAL ENDOWMENT FUNDS**

The B-CU National Alumni General Endowment Account is the portion of the university's endowment that was established in 2008 in perpetuity by the NAA with its Life Membership Club funds. The growth of the account is funded by annual donations of Life Membership fund and the accumulated compounded interest of the account. The Life Membership Club began during the tenure of the 14<sup>th</sup> National President Carver H. Portlock of Philadelphia in 1984 when Attorney Morris Milton of St. Petersburg introduced to the NAA the concept modeled after his fraternity's (Omega Psi Phi) Life Membership Club. The initial goal of attaining \$100,000.00 was changed to \$1,000,000.00 after it was accomplished. President Portlock appointed Attorney Morris Milton the first Chairman with Principal John Williams serving as Cochairman. Attorney Milton was elected National President in 1985 and Principal Williams began serving as Life Membership Chairman. Principal Nathaniel Davis of Jacksonville became the first National Life Member paying the fee of \$500.00. When asking for B-CU administrations approval of its goal of accumulating \$1,000,000.00 in the account, B-CU VP John Frink responded by saying "Why not \$2,000,000.00?" President Bronson responded to the goal by calling Williams a "Visionary". Over the years, the one-time Life Membership fee increased first to \$750.00 and later to \$1,000.00. The intent is to gradually increase the fee to \$2,000.00. The funds were invested with three different accounts over the years:

- Solomon, Smith, Barney of New York: invested \$87,000.00 in 1984 and ended at \$128,517.44 for a profit of \$41,517.44.
- Wachovia AIMS Fund in Daytona Beach: invested \$45,951.08 beginning in 1986 and ended at \$53,593.73 for a profit of \$7,642.65.
- 4M Entertainment in Orange County: Invested \$60,000.00 in 2006 in what turned out to be a Ponzi scheme. Owner Mr. Carmen "C. T." Andolina of Orlando ran away and cannot be located after losing or using the money. The \$60,000.00 was lost.

The net result of all investments is a loss of \$10,839.91. As a result of the investment loss and our inexperience in investing, the General Assembly at the 39<sup>th</sup> National Conference in Tallahassee in 2007 voted to turn the \$182,111.17 recovered from the investments plus other funds from the Life Membership Account over to Bethune-Cookman University so that the funds would be monitored and invested by B-CU along with the university's endowment funds. On September 29, 2008 under President Jacqueline Mongal, \$200,000.00 was turned over to B-CU *to be held in perpetuity as part of the university's endowment. Upon its reaching \$1,000,000.00 and thereafter, as a result of compound*

*interest income generated by the funds and additional annual donations from the NAA Life membership Club, the annual interest will be credited as an annual donation to B-CU from the NAA. The account had grown to \$254,763.28 on June 30, 2013.*

#### **NATIONAL ALUMNI ENDOWED SCHOLARSHIP ACCOUNT**

During the tenure of our 17<sup>th</sup> National President John Williams of Miami In 1999 as a result of a statement by the PreAlumni Council Sponsor Cathy Washington that B-CU students were unaware what the NAA was and what it did, National President John Williams started a policy of setting aside \$10,000.00 per year in restricted funds for establishment of a NAA Endowed Scholarship account on campus. *The guidelines were written to award 10 scholarships per year from the annual interest generated by the account to members of the PreAlumni Council according to the established guidelines.* The account has grown to \$108,116.44 as of 6/30/13. In 2013 the BOD voted to contribute \$10,000.00 per year to the account to move it above the \$200,000.00 level.

#### **NAA PREALUMNI ENDOWED ACCOUNT**

During the tenure of the 19<sup>th</sup> National President Jacqueline Mongal of Daytona Beach In 2007 following concern expressed by PreAlumni Council Sponsor Cathy Washington about the high cost of sending the B-CU PreAlumni Council to the annual UNCF/NAC/NPAC Conference, Budget & Finance Committee Chairman John Williams put forth a motion to set aside \$10,000.00 in *an endowed restricted account at Bethune-Cookman University in the name of the Pre-Alumni Council to remain in perpetuity with the interest income generated to be used annually to assist the Pre-Alumni Council in covering the expenses to its annual trip in accordance with established guidelines.* In 2008, the BOD approved a motion to increase the account to \$20,000.00. The account was at \$24,857.85 on 6/30/13.

#### **MIAMI-DADE COUNTY ENDOWED DIAMONDS SCHOLARSHIP ACCOUNT**

During the tenure of Miami-Dade County Chapter President Carol Weatherington In 2007, Scholarship Chairman John Williams introduced the idea of starting a Diamonds Scholarship Club by asking 30 chapter members to each donate \$1,000.00 over a three year period to fund a \$30,000.00 endowed scholarship account at B-CU in perpetuity in the name of the chapter. Fellow chapter members Carol Weatherington, Wayne Davis and the Late J. B. Turner agreed to serve on the committee and in June 2007 the initial donation was made to B-CU setting up the on-campus account. *The interest income generated by the account was to be used to award scholarship(s) according to the established guidelines to graduating high school senior(s) from Miami-Dade County who are attending B-CU in the fall.* The market value of the account was \$33,184.19 on 6/30/13.

*John H. Williams*

1/7/14

(W-9 VENDOR REQUEST LETTER)

Dear Vendor:

Pursuant to IRS regulations and NAA policy, vendors and/or individuals who receive remuneration for services performed for the National Alumni Association (NAA) are required to complete and provide the NAA Treasurer with a completed Form W-9, Request for Taxpayer Identification Number (TIP). Attached for your convenience is a copy of Form W-9 to be completed and emailed to [info@bcu-naa.com](mailto:info@bcu-naa.com) or mailed to:

*Treasurer  
B-C U National Alumni Association  
PO BOX 1899  
Daytona Beach, FL 32115*

For those vendors which receive \$600.00 or more, a Form 1099 will be submitted to the IRS with a copy being sent to the vendor.

Your cooperation is appreciated.

Sincerely,

\_\_\_\_\_, President

B-CU National Alumni Association

## **PRE-AUTHORIZATION OF EXPENDITURES PROCEDURE**

1. In order to obtain written preapproval for expenditure of NAA funds or to make a financial obligation on behalf of the Association, the Committee Head or authorized agent should complete a rough draft of the Pre-Authorization for Expenditures Form providing the details of the requested expenditures or transaction and fax it to the Treasurer in order to obtain the President's signature and approval.
2. After verifying availability of funds, the Treasurer will type up and sign the formal document before faxing it to the President for his/her signature pre-authorizing the expenditure/transaction. If funds are not available, the Treasurer will so state.
3. The President will approve or reject the proposed expenditure/transaction by signing the form and stamping it APPROVED or DISAPPROVED. Disapproval will be accompanied by a brief written explanation.
4. The President will fax a copy of the signed document to the agent and Treasurer to approve or disapprove the proposed expenditure/transaction. A copy will also be faxed to the Corresponding Secretary for filing.
5. If pre-approval is obtained, the Agent will work with the Treasurer to prepare the Purchase Order and complete the other required documents (Travel Voucher, Performance Agreement Form, Contract, and/or Check Requisition Voucher) needed to proceed with the purchase.
6. The agent will sign the invoice to indicate that merchandise has been received or service completed in a satisfactory manner and submit it to the treasurer for payment.
7. If merchandise and/or service has been acquired or performed satisfactorily and all documents properly submitted, the invoice or reimbursement will be paid within fourteen (14) business days.
8. The Treasurer will update the President and Financial Secretary and ensure that all documents are filed in the Alumni Center.

FORM 111111

## PRE-AUTHORIZATION FOR EXPENDITURES

Requestor \_\_\_\_\_ Committee \_\_\_\_\_ Date \_\_\_\_\_

Email Address \_\_\_\_\_ Telephone \_\_\_\_\_ Fax \_\_\_\_\_

Budget Line \_\_\_\_\_ Amount of Budget \$ \_\_\_\_\_

Vendor \_\_\_\_\_ Telephone \_\_\_\_\_ Fax \_\_\_\_\_

Address \_\_\_\_\_ Email \_\_\_\_\_

### Category

### Requested Expenditure

#### Merchandise:

_____	\$ _____
_____	\$ _____
_____	\$ _____

#### Travel (Travel Voucher from MOPAC must be attached for travel reimbursement):

_____	\$ _____
_____	\$ _____
_____	\$ _____

#### Other (A Performance agreements must be attached for vendor service):

_____	\$ _____
_____	\$ _____
_____	\$ _____

**TOTAL REQUESTED EXPENDITURES** \$ \_\_\_\_\_

☐ See attachment if checked.

The requestor will receive a signed copy of this document as authorization to make the requested expenditures listed above. Receipts and/or invoices must be submitted to the Treasurer to be attached to the Check Requisition Form as documentation before invoices can be paid.

President \_\_\_\_\_ Date \_\_\_\_\_ Fax Number \_\_\_\_\_

Treasurer \_\_\_\_\_ Date \_\_\_\_\_ Fax Number \_\_\_\_\_

*Note: Budget funds are money set aside for expenditure, if needed. Actual expenditure of the funds must be pre-authorized to be certain that they are actually available.*



## REQUEST FOR NAA ACTIVITY FORM

COMMITTEE \_\_\_\_\_ CHAIR PERSON \_\_\_\_\_

EMAIL ADDRESS \_\_\_\_\_ TELEPHONE \_\_\_\_\_

NAME OF ACTIVITY \_\_\_\_\_ DATE OF ACTIVITY \_\_\_\_\_

LOCATION OF ACTIVITY \_\_\_\_\_ CO-CHAIR PERSON \_\_\_\_\_

COMMITTEE MEMBERS OR ALUMNI INVOLVED WITH ACTIVITY \_\_\_\_\_

\_\_\_\_\_

ASSISTANCE/SUPPORT NEEDED FROM NAA, OTHER ALUMNI AND/OR CHAPTERS \_\_\_\_\_

\_\_\_\_\_

PURPOSE OF ACTIVITY \_\_\_\_\_

\_\_\_\_\_

FUNDS REQUESTED UPFRONT \$ \_\_\_\_\_ ADDITIONAL FUNDS NEEDED \$ \_\_\_\_\_ WHEN \_\_\_\_\_

NATURE OF ACTIVITY: ☐ Non-profit making ☐ Profit making Anticipated Profit \$ \_\_\_\_\_

ADDITIONAL COMMENTS \_\_\_\_\_

COMMITTEE CHAIR SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

PRESIDENT SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

For budget requests that are to be repeated annually, a copy of this form should be emailed to the Budget & Finance Committee at [jwilli1764@aol.com](mailto:jwilli1764@aol.com) or fax to 305-620-7312.



FORM 092913

BETHUNE-COOKMAN UNIVERSITY  
NATIONAL ALUMNI ASSOCIATION  
**NATIONAL ALUMNI ASSOCIATION OF B-CU  
PERFORMANCE AGREEMENT FORM**

This agreement between the National Alumni Association of Bethune-Cookman University and \_\_\_\_\_ (Vendor) sets forth the performance expectations and resulting compensation for the stated activity, function or services to be provided by the vendor.

**NAME OF ACTIVITY/FUNCTION:** \_\_\_\_\_

**SCOPE OF SERVICES:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**COMPLETION TIMELINE:** \_\_\_\_\_

**DOCUMENTATION/PROOF TO BE PRESENTED OF WORK PERFORMED:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**CONDITION(S) FOR PAYMENT:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**AMOUNT OF PAYMENT FOR SERVICES:** \$ \_\_\_\_\_

**PRE-APPROVAL OBTAINED:** ☐ **BUDGET & FINANCE COMMITTEE** \_\_\_\_\_  
☐ **EXECUTIVE COMMITTEE** \_\_\_\_\_

**DATE PAYMENT IS DUE:** \_\_\_\_\_

Signatures below indicate clear understanding about the terms of this agreement.

**NAA Signature** \_\_\_\_\_ **Vendor Signature** \_\_\_\_\_  
**Date** \_\_\_\_\_

\*Note: IRS forms W-9 and 1099 are required to be completed for vendors being paid over \$600.00 (except for reimbursements).

## **II. CHAPTER ASSESSMENT GUIDELINES**

### **A. CRITERIA USED TO SET CHAPTER ASSESSMENTS:**

1. **Past Performance.** How well did the chapter do (what percentage) in reaching its assessment during the past three years?
2. **Size of alumni population in the chapter's geographic region.** How many alumni are there in the county?
3. **Size of chapter.** Over the past three years, has the highest chapter membership been in group A (between 0 and 7, inclusive), group B (between 8 and 13, inclusive), or group C (14 and above)?

### **B. THE MINIMUM ASSESSMENTS GOALS ARE:**

0. Group C (Large Chapters)--\$ 6,100.00
1. Group B (Medium Size Chapters)--2,100.00
2. Group A—(Small Chapters)--\$ 1,600.00

### **C. MEANS OF APPEALING ASSESSMENTS ARE:**

1. The Chapter President completes and submits the attached Assessment Review Form to the Assessment Committee for review.
2. At the next Board of Directors meeting, the Assessment Committee will present your completed Assessment Review Form to the Board of Directors with recommendation for approval or rejection.
3. The Chapter president can appear before the Board of Directors during that time to support the request.
4. The board of directors will vote for approval or rejection of the petition.

### **D. MEANS OF ACHIEVING CHAPTER ASSESSMENT:**

1. Money collected as national dues during the fiscal year.
2. Money generated through souvenir journal ads.
3. Money generated through Ms. Alumni contest.
4. Money generated through the chapter contribution to the National Association



May 25, 20\_\_\_\_

**TO:** Chapter Presidents

**FROM:** \_\_\_\_\_, President  
National Alumni Association of B-CU

**SUBJECT: CHAPTER ASSESSMENT 20\_\_\_\_**

This is a friendly reminder that your Chapter Assessment for the \_\_\_\_\_ fiscal year is due within the next five (5) days. The yearly deadline for post marking the funds is June 1 of the fiscal year. The chapter assessments are important sources of revenue for both the National Alumni Association and Bethune-Cookman University since they are the main source of funds for the National's annual donation to the University. **Through this effort, alumni and their chapters are able to pool their resources and collectively contribute a generous sum of funds to the University each year in support of the University's mission and goals.** Student scholarships, recruitment, construction and expansion of facilities and programs are some if the areas that are positively impacted through our contribution. If you have already mailed your contribution, please disregard this reminder. Along with the donation that the NAA will submit to the University will be a listing of chapter contributions as detailed on our Chapter Assessment Report Form.

Again, we thank you for your leadership and direction as we attempt to increase our support of our Alma Mater. As a national organization, we are only as strong as our member chapters.

Thanks for all you do for B-CU.



BETHUNE-COOKMAN UNIVERSITY  
NATIONAL ALUMNI ASSOCIATION

June 4, 20\_\_

**TO:** \_\_\_\_\_, Chapter President  
\_\_\_\_\_ County Chapter

**FROM:** \_\_\_\_\_, Chairperson  
Chapter Assessment Sub-Committee

**SUBJECT: CHAPTER ASSESSMENT 20\_\_**

This is a friendly reminder that the Chapter Assessment Sub-Committee has not yet received your chapter's Ms. Alumni Contest contribution or Chapter Assessment funds for the 20\_\_-20\_\_ fiscal year. The yearly deadline for post marking the funds is June 1 of the fiscal year. The chapter assessments are important sources of revenue for both the National Alumni Association and Bethune-Cookman University since they are the main source of funds for the National's annual donation to the University. **Through this effort, alumni and their chapters are able to pool their resources and collectively contribute a generous sum of funds to the University each year in support of the University's mission and goals.** Student scholarships, recruitment, construction and expansion of facilities and programs are some if the areas that are positively impacted through our contribution. If you have already mailed your contribution, please disregard this reminder. Along with the donation that the NAA will submit to the University will be a listing of chapter contributions as detailed on our Chapter Assessment Report Form.

Again, we thank you for your leadership and direction as we attempt to increase our support of our Alma Mater. As a national organization, we are only as strong as our member chapters.

Thanks for all you do for B-CU.

## ASSESSMENT REVIEW FORM

NAME OF CHAPTER \_\_\_\_\_ DATE \_\_\_\_\_

CHAPTER PRESIDENT \_\_\_\_\_ EMAIL ADDRESS \_\_\_\_\_

ADDRESS \_\_\_\_\_ TELEPHONE NUMBER \_\_\_\_\_

Please provide the information requested below and submit to the National Alumni Office prior to April 1 for consideration by the Board of Directors. Please note that chapter assessments are determined by the chapter's size, past performance and size of alumni in chapter geographic region.

Current Chapter Assessment \$ \_\_\_\_\_ Requesting change of Chapter Assessment to \$ \_\_\_\_\_

Rationale for this request: \_\_\_\_\_

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Number of alumni in chapter's geographic area (get from Alumni Office or leave blank): \_\_\_\_\_

Number of chapter's financial members: This year \_\_\_\_\_, One year ago \_\_\_\_\_, Two years ago \_\_\_\_\_

Percent of assessment made: This year \_\_\_\_\_%, One year ago \_\_\_\_\_%, Two years ago \_\_\_\_\_%

SIGNATURE OF PERSON COMPLETING THIS REQUEST \_\_\_\_\_

OFFICE \_\_\_\_\_ TELEPHONE \_\_\_\_\_ EMAIL \_\_\_\_\_

B-CU ALUMNI CHAPTER ASSESSMENT 7/1/09-6/30/10																			
CHAPTER	ANNUAL ASSESSMENT	1	2	3	4	5	6	7	PERCENT ASSESSMENT ACHIEVED 2009-10	PERCENT ASSESSMENT ACHIEVED 2008-2009	PERCENT ASSESSMENT ACHIEVED 2007-2008	PERCENT ASSESSMENT ACHIEVED 2006-2007	PERCENT ASSESSMENT ACHIEVED 2005-2006	PERCENT ASSESSMENT ACHIEVED 2004-2005	PERCENT ASSESSMENT ACHIEVED 2003-2004	PERCENT ASSESSMENT ACHIEVED 2002-2003	PERCENT ASSESSMENT ACHIEVED 2001-2002	PERCENT ASSESSMENT ACHIEVED 2000-2001	PERCENT ASSESSMENT ACHIEVED 1999-2000
	2009-2010	(Life Membership dues are not included)				2009-2010	OTHER DONATIONS NOT INCLUDED IN ASSESSMENT (SCHOLARSHIPS)												
BROWARD	\$6,000	\$150	\$805	\$4,322	\$0	\$5,977		100%	9%	98%	88%	10%	20%	10%	15%	15%	133%	138%	10%
DUVAL/NASSAU	\$6,000	\$1,350	\$3,640	\$0	\$0	\$5,190	\$1,095	87%	21%	28%	197%	37%	111%	58%	32%	30%	60%	123%	20%
HILLSBOROUGH	\$6,000	\$700	\$150	\$2,000	\$6,000	\$8,850		148%	43%	280%	122%	408%	319%	125%	124%	219%	212%	214%	118%
MIAMI-DADE	\$6,000	\$1,150	\$1,800	\$4,380	\$0	\$7,330	\$6,200	122%	139%	490%	496%	180%	106%	330%	253%	217%	388%	205%	6%
ORANGE	\$6,000	\$900	\$1,100	\$1,000	\$0	\$3,000	\$5,000	50%	20%	101%	104%	104%	100%	86%	65%	58%	137%	129%	184%
PALM BEACH	\$6,000	\$2,300	\$2,695	\$15,000	\$0	\$19,895	\$2,500	332%	202%	417%	136%	173%	692%	236%	53%	424%	103%	92%	123%
VOLUSIA	\$6,000	\$1,250	\$150	\$0	\$0	\$1,400		23%	181%	750%	109%	250%	363%	474%	254%	315%	414%	212%	142%
ALACHUA	\$2,000	\$50	\$0	\$0	\$0	\$50		3%	28%	40%	0%	100%	126%	116%	14%	88%	64%	895%	0%
ATLANTA, GA	\$2,000	\$800	\$150	\$0	\$0	\$950	\$3,100	48%	50%	45%	21%	100%	103%	118%	82%	100%	36%	126%	27%
NASSAU, BAHAMAS	\$2,000	\$400	\$0	\$0	\$0	\$400		20%											
BIG BEND/GALSDEN	\$2,000	\$1,800	\$0	\$7,000	\$0	\$8,800		400%	473%	1030%	697%	110%	340%	279%	26%	123%	5%	11%	69%
ESCAMBIA	\$2,000	\$650	\$350	\$1,000	\$0	\$2,000		100%	185%	163%	182%	95%	151%	147%	18%	96%	67%	68%	15%
GEORGIA	\$2,000	\$0	\$0	\$0	\$0	\$0		0%	0%	25%	35%	60%	55%	80%					
LAKE/UMTER	\$2,000	\$300	\$0	\$0	\$500	\$800	\$1,000	40%	125%	100%	125%	130%	115%	125%	130%	200%	10%	14%	121%
POLK COUNTY	\$2,000	\$0	\$0	\$0	\$0	\$0		0%	0%	55%	65%	0%	150%	86%	45%	19%	85%	63%	127%
BREVARD	\$1,500	\$0	\$0	\$0	\$0	\$0		0%	0%	0%	100%	50%	0%	191%	0%	134%	150%	100%	47%
DELAWARE VALLEY	\$1,500	\$0	\$0	\$0	\$500	\$500		33%	33%	0%	200%	54%	244%	14%	7%	13%	174%	145%	130%
LAKE CITY	\$1,500	\$0	\$0	\$0	\$0	\$0		0%	0%	0%	0%	0%	0%	0%	0%	125%	0%	5%	0%
MANATEE/SARASOTA	\$1,500	\$300	\$0	\$0	\$0	\$300		20%	7%	110%	0%	0%	11%	0%	29%	7%	0%	22%	0%
MARION	\$1,500	\$50	\$0	\$0	\$0	\$50		3%	3%	0%	0%	10%							
NEW YORK	\$1,500	\$150	\$1,265	\$0	\$0	\$1,415	\$2,774	94%	77%	195%	180%	100%	52%	164%	32%	3%	251%	148%	116%
PINELLAS/ST. PETE	\$1,500	\$650	\$0	\$0	\$0	\$650		43%	36%	150%	120%	200%	466%	441%	220%	151%	169%	95%	41%
SEMINOLE	\$1,500	\$100	\$0	\$0	\$0	\$100		7%	3%	80%	482%	201%	234%	537%	10%	20%	0%	0%	7%
ST. LUCIE/FT. PIERCE	\$1,500	\$400	\$0	\$0	\$0	\$400		27%	3%	30%	0%	35%	50%	50%	70%	0%	22%	63%	35%
WASHINGTON D.C.	\$1,500	\$150	\$0	\$0	\$0	\$150		10%	5%	33%	0%	0%	95%	0%	0%	0%	3%	30%	2%
OTHER	\$1,500					\$0		0%	23%	150%	171%								
GRAND TOTAL		\$13,600	\$12,105	\$34,702	\$7,000	\$67,407	\$21,609.00												

Chapter assessments are determined by the chapter's size, past performance and size of alumni population in chapter's geographic region.  
 \*The sum of the amounts in columns 2 and 3 is used to determine the Ms. Alumni Contest winners.

### NAA CHAPTER EVALUATIONS 2012-13

CHAPTER ASSESSMENT RANGE	GRADE	PERFORMANCE LEVELS	STARS	CHAPTERS
300% - Above	A+	HIGH PERFORMING	☆ ☆ ☆ ☆ ☆	Lake City
200% - 299%	A	HIGH PERFORMING	☆ ☆ ☆ ☆ ☆	Palm Beach, Volusia, Hillsborough, *Miami-Dade
150% - 199%	B+	ABOVE AVERAGE	☆ ☆ ☆ ☆	*Big Bend/Gadsden
100% - 149%	B	ABOVE AVERAGE	☆ ☆ ☆ ☆	St. Pete/Pinellas, Duval/Nassau, Orange, Polk, *New York, *Escambia
75% - 99%	C+	AVERAGE	☆ ☆ ☆	
50% - 74%	C	SATISFACTORY	☆ ☆ ☆	
25% - 49%	D+	BELOW AVERAGE	☆ ☆	Atlanta, *Broward
1% - 25%	D	LOW PERFORMANING	☆	Marion, Ohio
0%	F	UNSATISFACTORY		Alachua, Lake/Sumter, Brevard, Delaware Valley, Indian River, Manatee/Sarasota, Nassau, North Carolina, Raliegh-Duraham, Putnam, Seminole, SW Florida, St. Lucie/Ft. Pierce, Washington D.C.

\* Five bonus percentage points are added for each of the following to a maximum of 15 points:

- Attendance at both BOD meetings
- National Conference attendance
- Ms. Alumni Contest participation

Five and Four-Star Chapters are recognized at National Conferences.

FORM 092813



# CHAPTER PERFORMANCE LEVEL 2007-2008

A three star (average) rating indicates that the chapter is performing satisfactory or "as expected."

CHAPTERS	CHAPTER ASSESSMENT	MS. ALUMNI CONTEST	BOARD OF DIRECTORS MEETING	NATIONAL CONVENTION ATTENDANCE	NATIONAL MEMBERSHIPS	CHAPTER AVERAGE RATING	CHAPTER PERFORMANCE LEVEL	STARS
BIG BEND/GADSDEN	5	5	3	6	3	4.40	High	☆☆☆☆☆
MIAMI-DADE	5	5	5	5	1	4.20	Above Average	☆☆☆☆☆
VOLUSIA	3	3	5	5	5	4.20	Above Average	☆☆☆☆☆
DUVAL/NASSAU	4	4	4	5	1	3.60	Above Average	☆☆☆☆☆
ESCAMBIA	4	4	5	5	1	3.80	Above Average	☆☆☆☆☆
PALM BEACH	3	3	5	5	2	3.60	Average	☆☆☆☆
SEMINOLE	5	5	4	2	1	3.40	Average	☆☆☆☆
HILLSBOROUGH	3	3	5	5	1	3.40	Average	☆☆☆☆
NEW YORK	4	3	0	1	4	2.40	Average	☆☆☆☆
ORANGE	3	3	5	5	1	3.40	Average	☆☆☆☆
BROWARD	2	3	5	2	3	3.00	Average	☆☆☆☆
BREVARD	3	3	0	1	1	1.60	Below Average	☆☆
GEORGIA	1	0	0	1	5	1.40	Below Average	☆☆
PINELLAS/ST. PETE	3	0	4	3	1	2.20	Below Average	☆☆
POLK COUNTY	2	0	0	0	5	1.40	Below Average	☆☆
DELAWARE VALLEY	4	2	0	0	0	1.20	Below Average	☆☆
LAKE/SUMTER	3	1	0	1	1	1.20	Below Average	☆☆
ATLANTA	1	0	4	2	1	1.60	Low	☆☆
ALACHUA	0	0	3	3	0	1.20	Low	☆☆
INDIAN RIVER	0	0	0	0	0	0.00	Unsatisfactory	
LAKE CITY	0	0	0	0	0	0.00	Unsatisfactory	
LIVE OAK	0	0	0	0	0	0.00	Unsatisfactory	
MARION	0	0	0	0	0	0.00	Unsatisfactory	
OSCEOLA	0	0	0	0	0	0.00	Unsatisfactory	
ST. LUCIE/FT. PIERCE	0	0	0	0	0	0.00	Unsatisfactory	
VIRGINIA	0	0	0	0	0	0.00	Unsatisfactory	
WASHINGTON D.C.	0	0	1	0	0	0.20	Unsatisfactory	

## PERFORMANCE LEVELS

4.50 - 5.00 High Performing  
3.50 - 4.49 Above Average  
2.50 - 3.49 Average  
1.50 - 2.49 Below Average  
0.50 - 1.49 Low Performing  
0.00 - 0.49 Unsatisfactory



## INTERNAL AUDIT CHECK LIST

Date \_\_\_\_\_

☐ Spring Audit

☐ Annual Meeting Audit

PROCEDURE	VERIFIED	COMMENTS
Deposit slips match bank statements.		
Checks issued match checks cleared.		
Check book is reconciled with bank statement monthly.		
Check book balance matches bank balance (closing balance + deposits in transit – outstanding checks = check book balance).		
A signed voucher is issued for each check written.		
An invoice, quote or receipt is attached to each voucher as documentation.		
Two signatures are included on each check.		
A review of Pay Pal and Credit Card transactions indicates proper use of established procedures.		

TOTAL INCOME FOR YEAR	\$
TOTAL EXPENDITURES FOR YEAR	\$
<b>NET PROFIT (INCOME – EXPENDITURES)</b>	\$

**RECOMMENDATIONS** The following are recommended:

- 
- 

**CONCLUSION** After a brief review of the financial records, it is the opinion of this committee that these financial records are in good order and conform to acceptable practices.

Sincerely,

\_\_\_\_\_, Chairperson  
The Audit committee

Committee Members Signature:

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Form 061708



## NOMINATIONS AND ELECTIONS AUDIT CHECK LIST

Date \_\_\_\_\_

Audit for Election Year \_\_\_\_\_

PROCEDURE	VERIFIED	COMMENTS
Candidates' mailing envelopes are stapled to their enclosed applications and kept in a safe and secure location in the Alumni Center along with counted ballots and other election documents until the end of the following fiscal year.		
The Corresponding Secretary's official mail log and postal date stamped on the envelope show that the candidates' application to run for office were mailed by the established deadline.		
Accounting Firm was utilized according to established guidelines.		
Election was conducted according to the procedures set forth in the By Laws and MOPAC.		

**RECOMMENDATIONS** The following are recommended:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**CONCLUSION** After a brief review of the election records, it is the opinion of this committee that the established procedures were utilized in accordance with and conforming to acceptable practices.

Sincerely,

\_\_\_\_\_, Chairperson  
The Audit Committee

Committee Members Signature:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Form 041912

\_\_\_\_\_ CHAPTER OF NAA

**INTERNAL AUDIT CHECK LIST**

Date \_\_\_\_\_

☐ Annual Audit 20\_\_\_\_ - 20\_\_\_\_

PROCEDURE	VERIFIED	COMMENTS
Deposit slips match bank statements.		
Checks issued match checks cleared.		
Check book is reconciled with bank statement monthly.		
Check book balance matches bank balance (closing balance + deposits in transit – outstanding checks = check book balance).		
A signed voucher is issued for each check written.		
An invoice, quote or receipt is attached to each voucher as documentation.		
Two signatures are included on each check.		
TOTAL INCOME FOR YEAR	\$	
TOTAL EXPENDITURES FOR YEAR	\$	
NET PROFIT (INCOME – EXPENDITURES)	\$	

**RECOMMENDATIONS** The following are recommended:

- \_\_\_\_\_
- \_\_\_\_\_

**CONCLUSION** After a brief review of the financial records, it is the opinion of this committee that these financial records: ☐ are in good order and conform to acceptable practices. ☐ do not conform to acceptable practices.

Sincerely,

\_\_\_\_\_, Chairperson

Committee Members Signature:

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

This Internal Audit Form should be completed and a copy mailed to the *National Alumni Association, P. O. Box 1899, Daytona beach, Florida 32115.*

Form 06170

### NAA ACCOUNTS RECEIVABLE LOG

<b>VENDOR</b>	<b>REASON FOR CHARGES</b>	<b>DATE OF CHARGES</b>	<b>AMOUNT</b>
Sample Chapter	Reimbursement of 2012 National Conference Advanced Seed Money	07/01/12	\$1,000.00
John Doe	Returned check #675 for Florida Classic tickets	11/21/09	\$80.00
Mary Jones	Table for Mary McLeod Bethune Breakfast	06/18/10	\$250.00

Adopted 6/16/11



BETHUNE-COOKMAN UNIVERSITY  
NATIONAL ALUMNI ASSOCIATION

P. O. Box 1899  
Daytona Beach, Florida 32115

## ACKNOWLEDGEMENT OF PAYMENT

Date: \_\_\_\_\_

Receipt Number: \_\_\_\_\_

Dear Mr./Ms. \_\_\_\_\_:

This is to acknowledge receipt of check/payment of \$\_\_\_\_\_ on the date of \_\_\_\_\_  
from:

NAME \_\_\_\_\_  
ADDRESS \_\_\_\_\_  
CITY/STATE/ZIP \_\_\_\_\_  
EMAIL ADDRESS \_\_\_\_\_  
TELEPHONE \_\_\_\_\_  
FAX NUMBER \_\_\_\_\_

for the following purpose(s):

- ☐ National membership dues for the year \_\_\_\_\_.
- ☐ Life Membership Club fee or Subscribing Payment.
- ☐ Registration for the 20\_\_ National Alumni Conference.
- ☐ Donation: \_\_\_\_\_.

We extend our gratitude to you for your support of alumni activities. Thanks for all you do for B-CU.

Sincerely,

**A. Ray Brinson**

A. Ray Brinson  
National President

The National Alumni Association of Bethune-Cookman University is registered under # CH28902 with Chapter 496.405 of the Florida Statutes, the Solicitation of Contributions Act. A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL-FREE (800-435-7352) WITHIN THE STATE. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION BY THE STATE.

*Wildcats on the prowl!*

*Appendix A14*

NATIONAL ALUMNI ASSOCIATION OF B-CU  
INVOICE/STATEMENT

Date
4/30/2013

<b>From:</b>	National Alumni Association of Bethune-Cookman University P.O. Box 1899 Daytona Beach, Florida 32115
<b>To:</b>	

Date	Transaction	Amount Due	Balance
04/30/2013	Check all that apply:		
	<input type="checkbox"/> Life Membership subscription Payment (\$1,000 over three years)	\$_____	\$0.00
	<input type="checkbox"/> National dues ( for non-Life Members)	\$50.00	\$0.00
	<input type="checkbox"/> National Conference Souvenir Journal Ad ,Gold Full Page , 8.5 x 11	\$250.00	\$0.00
	<input type="checkbox"/> National Conference Souvenir Journal Ad, Full Page, (7.5 x 10)	\$150.00	\$0.00
	<input type="checkbox"/> National Conference Souvenir Journal Ad, Half Page, (5.25 x7.5)	\$100.00	\$0.00
	<input type="checkbox"/> National Conference Souvenir Journal Ad, quarter Page 4.25x5.25	\$65.00	\$0.00
	<input type="checkbox"/> National Conference Souvenir Journal Ad, business card (2x3.5)	\$35.00	\$0.00
	<input type="checkbox"/> Sponsorship, Conference or _____	\$_____	\$0.00
	<input type="checkbox"/> NAA Scholarship Pledge/Donation	\$_____	\$0.00
	<input type="checkbox"/> Other Donation/Pledge_____	\$_____	\$0.00
	<b>TOTAL ENCLOSED</b>	<b>\$_____</b>	

This is a courtesy reminder of your pledge. Please mail your check or money order to the above address. To be financial, both local and National dues must be paid. National Life Membership payments are to be completed within three years. Provide the information below to be emailed or faxed a receipt. Thanks for all you do for B-CU.

NAME \_\_\_\_\_ DATE \_\_\_\_\_

ADDRESS/CITY/ZIP \_\_\_\_\_

TELEPHONE \_\_\_\_\_

EMAIL ADDRESS \_\_\_\_\_

FAX NUMBER \_\_\_\_\_

COMMENTS



**BETHUNE-COOKMAN UNIVERSITY  
NATIONAL ALUMNI ASSOCIATION**

POST OFFICE BOX 1899  
DAYTONA BEACH, FLORIDA 32114  
WWW.BCU-NAA.COM

**CHECK REQUISITION FORM**

Check Requisition Form No. \_\_\_\_\_ Date: \_\_\_\_\_

**REQUESTOR INFORMATION**

Vendor Company Name (if applicable): \_\_\_\_\_

Contact Name: \_\_\_\_\_ Title: \_\_\_\_\_

Type of Activity: \_\_\_\_\_

Date(s) of Service: \_\_\_\_\_

**EXPENDITURES**

1. \_\_\_\_\_ \$ \_\_\_\_\_
2. \_\_\_\_\_ \$ \_\_\_\_\_
3. \_\_\_\_\_ \$ \_\_\_\_\_
4. \_\_\_\_\_ \$ \_\_\_\_\_
5. \_\_\_\_\_ \$ \_\_\_\_\_

*Continue on back if more space needed. \*\*Please attach all receipts\*\**

Expenditures from back of this sheet: \$ \_\_\_\_\_

Grand Total: \$ \_\_\_\_\_

**PROCESSING INFORMATION**

Make Check Payable to:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Mail to: Bethune-Cookman University National Alumni Association  
Post Office Box 1899  
Daytona Beach, Florida 32114

**INTERNAL USE ONLY**

Budget Category: \_\_\_\_\_

Approved By: \_\_\_\_\_

Treasurer Approval: \_\_\_\_\_

Issued Check #: \_\_\_\_\_ Date Issued: \_\_\_\_\_ Amount Paid: \_\_\_\_\_

*Note: All expenditures that are not in compliance with the By-Laws will not be honored.*





P.O. Box 1899  
Daytona Beach, FL 32115

**PRESIDENT**  
Evelyn Walker

**VICE PRESIDENT**  
Rev. Johnny Douglas

**REC. SECRETARY**  
Christie Jacobs

**CORR. SECRETARY**  
Essie Smith

**FIN. SECRETARY**  
Cathy Washington

**TREASURER**  
Carolyn Martin

**PARLIAMENTARIAN**  
John Williams

**CHAPLAIN**  
Rev. Obbie Burns

**Dir. of Public Relations**  
Gina Sanders

**Alumni Representative**  
Audley Coakley

**Alumni Representative**  
Atty. Johnny McCray

**Immd. Past President**  
Jacqueline Mongal

# National Alumni Association Bethune-Cookman University

Date \_\_\_\_\_

Dear \_\_\_\_\_ :

This is a friendly reminder that another installment on your subscription to the Life Membership Club of the National Alumni Association of Bethune-Cookman University is now due. The payment plan that you selected involves paying the \$1,000.00 via one of the following options:

1. Two annual payments of \$500.00 each
2. Ten monthly payments of \$100.00 each

Subscribing members must stay current with their payments in order to maintain active status with voting rights, inclusion on the souvenir journal Life Membership Roster, all other rights afforded members, and to avoid paying a \$50.00 reinstatement fee. Thus far you have been credited with paying a total of \$\_\_\_\_\_.

Return the bottom portion of this form with your payment made payable to **National Alumni Association of B-CU** to P. O. Box 1899, Daytona Beach, Florida 32115.

Sincerely,

John H. Williams  
Life Membership Chairman

\*\*\*\*\*

Date: \_\_\_\_\_

Dear Madam President:

Enclosed is my check/money order for \$\_\_\_\_\_ payable to the **National Alumni Association of B-CU** to be applied toward my life membership fee in the Bethune-Cookman University National Alumni Association. This should bring my total of payments to \$\_\_\_\_\_.

Sincerely,

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Email: \_\_\_\_\_ Telephone \_\_\_\_\_



P.O. Box 1899  
Daytona Beach, FL 32115

**PRESIDENT**  
A. Ray Brinson

**VICE PRESIDENT**  
Chandra Simmons

**REC. SECRETARY**  
Marilyn Jordan

**CORR. SECRETARY**  
Jennifer Adams

**FIN. SECRETARY**  
Glendal Johnson

**TREASURER**  
Essie Smith

**PARLIAMENTARIAN**  
Robert Delancy

**CHAPLAIN**  
Dr. Herbert Corbin, Jr.

**Dir. of Public Relations**  
Jacqueline T. Mongal

**Alumni Representative**  
Rufus Wilson

**Alumni Representative**  
Rev. Johnny Douglas

**Immd. Past President**  
Evelyn Walker

# *National Alumni Association*

## *Bethune-Cookman University*

June 10, 2013

Dear Alumnus \_\_\_\_\_:

We are pleased to welcome you as a full member of the Bethune-Cookman University National Alumni Association's Life Membership Club. As you join the over 440 Life Members, we salute you as one of the National Alumni Association's loyal members who goes that extra mile to advance the Association in its support of our alma mater.

All "Full Members" are included on the Life Membership Roster in our National Conference Souvenir Journal, given full financial membership status with voting rights in national elections, and given other privileges as may be offered from time to time.

Your life membership clock will be presented to you or a chapter member at the annual conference in June 2013 or, if you prefer, mailed to your home or your chapter president. Please email me at [jwilli1764@aol.com](mailto:jwilli1764@aol.com) or call me at 786-218-4646 or to inform me of your preference.

Sincerely,

*John H. Williams*

John H. Williams  
Life Membership Chairman



P.O. Box 1899  
Daytona Beach, FL 32115

**PRESIDENT**  
A. Ray Brinson

**VICE PRESIDENT**  
Rev. Johnny Douglas

**REC. SECRETARY**  
Christie Jacobs

**CORR. SECRETARY**  
Carolyn Parker

**FIN. SECRETARY**  
Glendead Johnson

**TREASURER**  
Lee Bryan

**PARLIAMENTARIAN**  
John Williams

**CHAPLAIN**  
Essie Smith

**Dir. of Public Relations**  
Gina Sanders

**Alumni Representative**  
Audley Coakley

**Alumni Representative**  
Atty. Johnny McCray

**Immd. Past President**  
Evelyn Walker

# *National Alumni Association Bethune-Cookman University*

April 4, 2011

Dear Alumnus \_\_\_\_\_:

We are pleased to welcome you as a new member of the Bethune-Cookman University National Alumni Association's Life Membership Club. As you join the over 450 Life Members, we salute you as one of the National Alumni Association's loyal members who goes that extra mile to advance the Association in its support of our alma mater. As a new member, you opted to use one of the payment plans listed below:

1. One payment of \$1,000.00.
2. Two payments of \$500.00 each with the final payment due prior to May 1, of next year.
3. Ten payments of \$100.00 each with each payment due on the first day of each of the next nine months.

If you opted for payment plans 2 or 3 above, your life membership status will be "Subscribing Member" until the \$1,000.00 fee is fully paid. Once it is fully paid, your status will change to "Full Member." All "Full Members" and "Subscribing Member" who are current with their payments will be included on the Life Membership Roster in our National Conference Souvenir Journal, given full financial membership status and other privileges as may be offered from time to time.

Subscribing Members who do not complete their payments within two years will have their names removed from the Life Membership Roster and their payment will be recorded as a donation to the Life Membership fund. Subscribing members must continue to pay national dues until their payments are completed.

For new members who complete their payments by May 1, their life membership clocks will be presented at the annual conference or, if they prefer, mailed to their homes. If there are questions, please call me at 305-620-7312 home, 786-218-4646 cell or email me at [jwilli1764@aol.com](mailto:jwilli1764@aol.com).

Sincerely,

*John H. Williams*

John H. Williams  
Life Membership Chairman



BETHUNE-COOKMAN UNIVERSITY  
NATIONAL ALUMNI ASSOCIATION

### NAA FINANCIAL TRANSACTIONS

RESPONSIBLE INDIVIDUAL	TASK	TIMELINE
Officers and Committee Chairs	Articulation and transference of records should occur between all outgoing and incoming officers and Committee Chairs.	4 years
Corresponding Secretary	Retrieve mail from NAA mailbox, enter in Mail Log and distribute copies to appropriate individual(s), President, Financial Secretary, Treasurer and Recording Secretary. A copy of the mail log should be transmitted to the Recording Secretary for updating of email, telephone and mailing addresses. Mail Log Records and other documentation should be labeled and stored in Alumni Center files or Records Room prior to leaving office.	Weekly
Treasurer	After receiving incoming finances from Corresponding Secretary, record details in record book and deposit funds in NAA Bank Account. Copies of Life Membership applications and other related information should be emailed, faxed or mailed to Life Membership Chairperson for further action. Bills documented with <b>Invoices</b> or properly executed <b>Check Requisition Forms</b> should be paid with documentation being stamped "PAID", dated and filed along with copy of check. Copies of bank receipt and other documentation should be faxed, emailed or mailed to Financial Secretary. Record books and other documentation should be labeled and stored in Alumni Center Records Room prior to leaving office.	7 DAYS
Financial Secretary	After receiving details of income and from Recording Secretary and Treasurer, record financial transactions in record book and email, fax or mail a <b>receipt</b> or <b>Letter of Acknowledgement</b> to alumni or source of incoming revenue. . Books and other documentation should be labeled and stored in Alumni Center Records Room prior to leaving office.	14 days
Life Membership Chairperson	Record new Life Membership data in Life Membership records keeping track of Subscribing Members and their periodic payments. Life Membership Roster, email list and mailing list should be updated with new data. Mailing addresses of new members should be transmitted to Nominations and Elections Chairperson for use in elections. A Life membership Welcome letter should be emailed, mailed or faxed to new Life Member. Life Membership Records and documents should be transmitted to new Chairperson before leaving office. Annual reminders of payments due should be emailed or faxed to Subscribing Members in February. Life Membership Roster should be emailed to Souvenir Journal Chairperson prior to the announced ad deadline. A list of new fully paid Life Members should be transmitted to Treasurer a month prior to the National Conference for purchase of Life Membership Clocks and Gold Membership Cards.	21 days
Committee Chairs	Request for budget allocations along with justifications should be transmitted to Budget & Finance Chairperson prior to Fall BOD meeting.	September 15



## Bethune-Cookman College

Founded in 1904 by Dr. Mary McLeod Bethune

June 15, 2007

Alumni Relations

Mr. John H. Williams  
National Alumni Association  
Scholarship Committee Chairman  
1764 NW 192<sup>nd</sup> Street  
Miami, Florida 33056

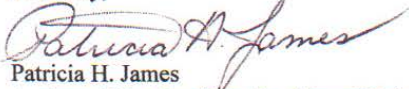
Dear Mr. Williams:

Please find enclosed your copy of the signed amended scholarship agreement form for the Bethune-Cookman University National Alumni Endowed Scholarship. As per your request, the annual earnings (defined as interest, dividends and **realized** gains and losses, less management fees) generated from the endowed scholarship will be rolled into the account principal until the principal reaches \$100,000.00. At that time, the annual spendable amount as defined in the University's endowed spending policy (currently 3.5% of the prior 3-year tolling average market value) will be divided equally among ten recipients that are active members of the Pre Alumni Council based on established criteria. The \$100,000.00 principal shall remain in perpetuity.

In reference to establishing a trust fund for the Pre Alumni Council (PAC), the University does not establish trust funds. When the National Alumni Association is prepared to make the \$10,000.00 contribution to the Pre Alumni Council, please submit a letter to the University with the contribution restricting the funds to the PAC and how the funds are to be used. Those funds will be placed in a restricted account for the Council and will be expensed based on the criteria outlined in the letter.

I would like to express our appreciation for the contributions and continued support the university receives from the National Alumni Association. The personal investment of the Association is a critical link that helps the university preserve its past, while ensuring a strong, viable presence in the future. Should you have questions or need further information, please do not hesitate to telephone me at (386) 481-2957 or email me at [jamesp@cookman.edu](mailto:jamesp@cookman.edu).

Sincerely,



Patricia H. James  
Assistant Vice President for Alumni Relations

cc: Ms. Melissa Peters, AVP for Finance and Budget/Director of Accounting Services  
Ms. Jacqueline Mongal, NAA President

*Sustaining a legacy of faith, scholarship and service*

640 Dr. Mary McLeod Bethune Boulevard • Daytona Beach, FL 32114-3099  
386.481.2970 • Fax 386.481.2973  
[www.bethune.cookman.edu](http://www.bethune.cookman.edu)  
Email [bccalumni@cookman.edu](mailto:bccalumni@cookman.edu)





## BETHUNE-COOKMAN UNIVERSITY AMENDED SCHOLARSHIP AGREEMENT

This Scholarship Agreement is entered into the 30<sup>th</sup> day of July, 2000, by and between National Alumni Association [Name of Donor] (the "Donor") and Bethune-Cookman University (the "University").

1. Name of the Scholarship: National Alumni Endowed Scholarship
2. Date Established: 7/30/2000
3. Initial Year of Award: 2005-2006
4. Type of Award: ☒ Endowment (\$10,000 minimum)  
☐ Annual (named scholarship – minimum of \$1,000 annually for at least 5 years)  
☐ One-Time Award
5. Total Amount of the Scholarship Fund: \$100,000.00
6. The scholarship will be funded in the following manner:  
\$10,000 due and payable on or before July 30th of each year until completed.  
\$ \_\_\_\_\_ due and payable on or before \_\_\_\_\_  
\$ \_\_\_\_\_ due and payable on or before \_\_\_\_\_

Would you like to receive payment reminders? ☒ yes ☐ no

7. Donor's Preferences for Selection of Recipient(s):

☐ I prefer to have the Scholarship Committee establish criteria for the award.

Financial Need: ☐ Required ☒ Preferred  
Minimum GPA: ☒ 2.5 ☐ 3.0 ☐ 3.5 ☐ Other  
Class: ☒ Fr ☒ Soph ☒ Jr ☒ Sr and ☒ at large  
Geographical: ☒ Any ☐ Specify \_\_\_\_\_  
Major Area of Study: ☒ Any ☐ Specify \_\_\_\_\_

Other Restrictions: Must be an active member of the Pre-Alumni Council as certified by its sponsor under National Alumni Association guidelines (see attachment).

8. Number of Students to Award Annually: 10 Amount of Each Award: yearly earnings interest divided equa  
beginning after the principal has grown to \$100,000.

9. Scholarship Recipients are eligible to renew: ☒ yes ☐ no

10. Donor Information

Donor Name: National Alumni Association of BCU  
Address: P.O. Box 1899  
City: Daytona Beach State: FL Zip: 32115  
Phone: Home \_\_\_\_\_ Work \_\_\_\_\_  
E-Mail: \_\_\_\_\_

11. I permit Bethune-Cookman to publicize this gift ☒ yes ☐ no

12. Additional Comments: The annual interest shall be added to the principal until the principal grows to and remains at \$100,000.00.



## **SCHOLARSHIP AWARD GUIDELINES**

1. Ten thousand dollars (\$10,000.00) of the National Alumni Association's annual donation to Bethune-Cookman University shall be allocated annually as restricted funds until \$110,000 are accumulated for funding of a \$100,000.00 scholarship account and a \$10,000.00 trust account to be governed according to the guidelines given below.
2. The PreAlumni Sponsor or an alumnus appointed by the National President shall represent the National Alumni Association on the Selection Committee for selecting the annual recipients of the National Alumni Association scholarships.
3. The goal of the scholarship program is to make students and college personnel aware of the alumni association and its role through increased alumni presence on campus, increased visibility, increased involvement, increased participation and increased support of student and college activities.
4. The annual interest generated from the endowed scholarship shall be divided equally among ten recipients that are active members of the Pre-Alumni Council based on established criteria. The awarding of the scholarships shall commence when principal and accumulated interest total \$100,000.00 or more.
5. At least two recipients shall be members of each of the four classes: freshman, sophomore, junior and senior. The freshman scholarships shall commence at the beginning of the second semester. The other two scholarships shall be awarded to students at-large regardless of their classification.
6. The selection shall be on a point system that is based on criteria such as:
  - A. active membership
  - B. level of participation in Pre-alumni activities
  - C. attitude
  - D. cooperation
  - E. need
  - F. Grade Point Average (at least 2.5)
7. The Scholarship award shall be used to assist with purchase of textbooks, payment of fees, tuition, and/or room & board.
8. The funds must be used at Bethune-Cookman University while the student is currently registered as a student.
9. A restricted account of \$20,000 shall be established on campus in the name of the Alumni/PreAlumni Association. The yearly interest from the restricted account shall be used to help finance the travel/hotel expenses of Pre-alumni members to the annual UNCF/NAC/NPAC Conference.

*Adopted 4/30/05  
Amended 4/22/06*