COLLEGIATE CHAPTER OPERATIONS MANUAL

AMERICAN MARKETING ASSOCIATION
COLLEGIATE CHAPTERS DIVISION
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CHICAGO, IL. 60601
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INTRODUCTION

WELCOME TO THE AMA
SUPPORT AND CONTACTS FOR CHAPTER LEADERS
Welcome to the American Marketing Association. The Chapter Operations Manual is designed to provide chapter leaders with information on how to run successful chapter management and operations, how to participate in AMA programs, and how to make the most of your members’ AMA collegiate membership.

The Chapter Operations Manual can provide you with chapter management ideas, programming suggestions, answers to commonly asked questions and valuable insights. Using this information, along with information on the AMA website, will maximize the success of your chapter in the coming year. Remember, even the greatest intentions and most creative ideas cannot be implemented effectively without member motivation, involvement and reward. Your chapter will be only as good as the efforts of its officers and members.

Making use of the ideas outlined in this manual is the first step in building a strong foundation for your chapter. Officers must then lead the membership to achieve its goals. Your efforts will not only ensure a successful year, but also build a base which will enable future leaders to continue the tradition and standards of excellence. Best wishes for a successful and productive year!

SUPPORT AND CONTACTS FOR CHAPTER LEADERS

The mission of the AMA collegiate division is to offer a platform for professional development for AMA collegiate chapters and student members and by providing career resources, experiential learning, and leadership opportunities through participation in AMA competitions and the execution of chapter events.

The first steps to successful chapter management are to know what resources are available to you and to maintain a strong connection with the AMA.

Collegiate Communities Manager
The Collegiate Division is supported with a full-time staff position, devoted to providing collegiate chapters and members with the chapter resources they need to run their chapters. The Collegiate Communities Manager can assist with everything from competitions to required chapter reporting and more.
Contact Info: collegiate@ama.org or 312-542-9043

Customer Support Center
AMA Customer Support Center is the contact for any member questions or issues, including website login, missing member ID details, name and address changes, member application and conference registration processing and receipts.
Contact Info: info@ama.org or 800-AMA-1150 (800-262-1150)

Collegiate Chapters Council
In addition, a 12-member volunteer Collegiate Chapters Council (CCC) of Faculty Advisors is available as a resource. A current listing of CCC members is available under Leader Resources tab located in the AMA Student Resource Center website.

Student Resource Center
In addition to staff, the CCC, and the operations manual, a great deal of the information that you will need for the year is available on the AMA’s website under the Student Resources Center. There you will find additional information on Awards & Competition information, Chapter Plans and Annual Reports guidelines and due dates, and Leader Resources to help you manage your chapter effectively. Take a few moments to visit, discover and bookmark the AMA’s Student Resource Center.
COLLEGIATE CHAPTER AFFILIATION

HOW TO AFFILIATE WITH THE AMA
REMAINING AFFILIATED
CHAPTER REINSTATEMENT
Collegiate membership and chapter affiliation in the American Marketing Association opens up your professional possibilities. As a member, you have access to the latest in marketing news, insights, and information. You also can take advantage of exclusive member discounts. As an AMA collegiate chapter, members have immediate opportunities for professional development in chapter activities, participation in AMA competitions, and networking.

Affiliating an AMA collegiate chapter on your campus can be a professionally and socially rewarding experience. All it takes is a dedicated leader to start the process.

COLLEGIATE CHAPTER AFFILIATION

Requirements to start an AMA Collegiate Chapter:
- Find a faculty member on campus who will serve as faculty advisor to the collegiate chapter (faculty advisor must be or become an AMA member before chapter can be approved)
- Submit a petition with at least 10 AMA student member names and their member ID or submit 10 new AMA student member applications online with payment of $50 per student (new members are encouraged to join online)
- Submit Officer Report Form with Faculty Advisor and future Chapter President info
- Create a constitution outlining how the Chapter will operate (a sample is provided)
- Submit a $50-chapter affiliation fee (*Reinstatement fee of $50 will also apply for chapters that are no longer active and wish to start-up their campus charter)

Once your chapter affiliation documents are received by the AMA, your chapter should be approved by email in four to five weeks, or less. You will be sent an electronic Chapter Affiliation certificate and helpful links that include access to the new Collegiate Chapter Orientation Webinar, Facebook Group, faculty advisor & president calls, digital promo templates to help you promote your chapter around campus, and much more. Forms for Chapter Affiliation are available on the AMA collegiate Student Resource Center under the “Start a Chapter” tab. Completed Affiliation documentation can be emailing to the AMA Collegiate Division at: collegiate@ama.org. A new chapter may affiliate at any time during the year.

Requirements to remain affiliated as an AMA collegiate chapter:
The AMA Collegiate Chapters Council (CCC) sets operating standards for collegiate chapters. These standards must be upheld by each collegiate chapter to maintain its charter with the Association. To remain an affiliated chapter, chapters must meet the criteria and annually submit the required reports outlined below:

- **Online Officer Report From (ORF):** The officer report form is the communication link between your chapter and AMA and is essential for contact with chapter presidents and advisors.

Chapters should elect officers once a year to fulfill a one-year term (preferably in the spring, so new officers will receive communications throughout the summer months). We strongly advise making this the responsibility of the outgoing chapter President. **Chapter officers must submit the officer report form by May 1 of each year.**

Chapters must re-report the faculty advisor each year, for a July 1 to June 30 term. Chapters without a reported Advisor could have their AMA charter revoked, so do not forget to re-report your advisor. All chapter that experience Chapter Officer changes during any time of
the school year must report all new incoming leaders to ensure charter affiliation and continuing access to all AMA communications related to collegiate.

- **Chapter Plans**: The Chapter Plan is intended to focus the chapter’s attention and efforts on what needs to be accomplished in the academic year and how to achieve these goals.

The Chapter Plan is designed to assist chapter leadership and members in developing their chapter goals and the strategies that will be used to achieve those goals. *The Chapter Plan must be submitted annually in the Fall semester (usually early October).* Check the AMA Student Resource Center for guidelines, submission requirements and due date.

- **Annual Report**: The Annual Report details what the chapter accomplished, that was outlined in the Chapter Plan. Submission of both the Chapter Plan and Annual Report by the due dates listed on the AMA Student Resource Center are required of all affiliated chapters, regardless of competing for awards.

The report and the plan form the basis for the judging for the Annual Awards Program. The Annual Report must be submitted annually at the beginning of the Spring semester (usually mid-February). Check the AMA Student Resource Center for guidelines, submission requirements and due date.

- **Per the chapter’s charter and constitution with AMA, all chapter members must also be AMA Global Support Center members. Chapters found to be offering a “dual” membership option of “chapter only” to members risk their charter being revoked by AMA.**

**Deactivated Chapters:**
Chapters which do not meet the minimum requirements for chapter affiliation will have cause for chapter deactivation, and their charters will be revoked at the discretion of the AMA and the Collegiate Chapters Council. *While all due care will be made to reach out to the chapter, the AMA reserves the right to deactivate a chapter that has not met the annual reporting or membership requirements.*

**Chapter Reinstatement:**
If a formerly affiliated AMA collegiate chapter wishes to re-establish its ties with the AMA, it must re-apply for affiliation the same way in which a new Chapter does. See the section above: Requirements to remain affiliated as an AMA collegiate chapter or visit the AMA Student Resource Center “Start a Chapter” tab. (*Reinstatement fee of $50 will also apply.*)

Questions about reinstatement, contact the AMA Collegiate Division at collegiate@ama.org.
COLLEGIATE MEMBER BENEFITS

COLLEGIATE MEMBERSHIP DUES
COLLEGIATE MEMBER BENEFITS
AMA collegiate membership is available to any full-time undergraduate student attending a regionally or nationally accredited academic institution of higher learning. The student must be working toward a degree and not be concurrently employed in a full-time professional position.

Through AMA membership, your chapter will bring together a group of dynamic, committed students who are interested in the field of marketing. Your chapter will be strengthened as each member gains experience, information and exposure to the marketing community at large by taking advantage of member benefits.

Questions answered in this section:
• How much are AMA collegiate member dues?
• What are membership benefits?
• What programs does AMA offer for chapters?
• What is the AMA International Collegiate Conference?
• What services are available to help chapter leaders with chapter management?

Collegiate Membership Dues:
As an AMA collegiate member, you have access to the latest in marketing news, insights, and information. You also can take advantage of exclusive member discounts. As of July 1, 2017, **AMA collegiate national dues are $50 annually (plus any local chapter dues)**. The fee includes a one-year digital subscription to Marketing News as well as the benefits outlined below. These benefits, in addition to the professional development activities that each collegiate chapter provides, make AMA membership one of the best investments a student can make.

Collegiate Member Benefits:
College students can increase their understanding of the marketing profession, begin career development, and gain valuable skills by joining the American Marketing Association. Collegiate membership benefits include:

- **Marketing News**
  As a collegiate member you have digital access to Marketing News online. This leading publication for the marketing industry keeps you abreast of new ideas and developments in marketing, including market research, new product development, marketing communications, direct marketing, distribution and much more.

- **AMA Student Job Board/College2Career**
  The AMA Student Job Board and College2Career provides student members with resources to help them successfully search for a job opportunities, plan/manage their career path and transition to the professional world. Information available includes:
  - Career section for students with detailed information on marketing careers
    - AMA Job Board
    - Internships
    - AMA Student Career Content
  - AMA Professional Certified Marketer (PCM®)
  With the AMA PCM program, you’ll not only gain the knowledge you need to advance your career, but you’ll also prove to employers you’re equipped to take on modern marketing challenges.

- **Collegiate Connections Newsletter**
  Published when school is in session, this e-newsletter is the primary communication between the AMA and its collegiate members, featuring updates on the annual collegiate conference &
competitions, as well as important news for your local chapter management. Archived issues of Collegiate Connections are available online.

- **Young Professional Membership**
The AMA offers graduating student members one year of complimentary young professional membership with national and local professional chapter dues waived. At the conclusion of one year of complimentary young professional membership, members can choose to renew their young professional membership for two additional years at the regular young professional membership rate, which includes payment of both national and local dues.

Young professionals that take advantage of this offer will receive three years’ worth of young professional membership for the price of one year of professional membership. For more information visit the AMA online or to sign up for the free membership, contact the AMA Customer Support Center at info@ama.org.

- **AMA-Sponsored Chapter Programs**
AMA encourages all collegiate chapter members to participate in the following programs to take full advantage of their membership. Participation in these programs gives members further hands-on marketing and business-related experience.
  - The annual International Collegiate Conference provides leadership training, leading speaker practitioners, a Career Fair, and career development opportunities
  - The Annual Collegiate Awards & Competitions provides experience in strategic planning and recognizes collegiate chapters for their outstanding achievements
  - The Case Competition provides students the opportunity to work on real-world marketing challenges. All affiliated AMA collegiate chapters can participate without leaving their campuses!

- **Local Professional Chapters**
The American Marketing Association's professional chapters provide programming, networking opportunities and other benefits within local communities. Seventy-five AMA professional chapters operate throughout the United States, Canada and Mexico, and many offer discounted student membership.

Professional chapters are composed of practitioners, educators and students, and chapters often host special student programs that enhance AMA collegiate membership, including events like career forums, conferences, workshops, and scholarships.

To locate a Professional Chapter, click here.

**The value of membership in any professional organization is not limited to tangible benefits.** AMA collegiate members gain valuable leadership experience by actively participating in chapter activities and serving in officer or committee positions. Chapters run like a business, and virtually every operation involves a marketing function, or the application of ideas presented in marketing or business classes. **The more you put in to your chapter, the more you get out of it!** Active members make themselves more marketable by availing themselves of opportunities to:

- Enhance leadership skills
- Learn how to fundraise
- Improve social media skills
- Learn how to run an effective business
- Develop and implement an operating plan and budget

These skills and more can enhance a member’s resume and can be applied to any professional career position. Recruiters are looking for these experiential learning activities and skills, that set candidates apart in this competitive job environment.
Résumé enhancement is often one reason students join AMA—so make sure your résumé makes the most of your experience! As a member, you can always note your membership as such with the appropriate years you were a member:

- **Member, American Marketing Association, 2016-2020**
  If you are active in your chapter, your résumé will be much more descriptive about your potential in a professional marketing position. For example:

- **Chapter Membership Committee**
  Used personal sales techniques to increase membership by 25%.

- **VP Communications**
  Wrote quarterly newsletter targeted to current members and alumni.

- **Chapter Fundraising Committee**
  Raised $500 by implementing direct mail and email campaign to chapter alumni.

- **Leadership Session Participant, AMA International Collegiate Conference**
  Presented officer training strategies to fellow AMA collegiate chapter leaders.

- **Case Competition Team Member**
  Conducted research and developed promotional strategies in response to Case problem. Received "Honorable Mention" award.

Nowhere but through your AMA Collegiate Chapter do you have access to such a wide range of hands-on experience and the latest information in the marketing field.

AMA is committed to furthering the professional development of our collegiate members and continually strives to improve existing programs, while developing new opportunities to meet the needs of our members.
EFFECTIVE CHAPTER OPERATIONS

THE CHAPTER BOARD OF DIRECTORS
  JOB DESCRIPTIONS
  BOARD RESPONSIBILITIES
PLANNING ELECTIONS
OFFICER TRANSITION
PLANNING IMPLEMENTING GOALS AND STRATEGIES
MANAGING CHAPTER FINANCES
  NONPROFIT STATUS
  INCOME AND EXPENSES
  MEMBERSHIP DUES
  MANAGING MEMBERSHIP DUES
  COLLECTING DUES
  KEEPING ACCURATE RECORDS
  FINANCIAL RECORDS
CHAPTER MEMBERSHIP ROSTER
  HOW TO REQUEST A MEMBERSHIP ROSTER
  HOW TO READ A CHAPTER ROSTER
Questions answered in this section:
• What are common board positions and the responsibilities for each position?
• What is the role of the faculty advisor?
• How should a chapter manage its finances?
• How does a collegiate chapter obtain a non-profit tax ID number?
• Are there other resources available on how to manage a chapter effectively?

The Chapter Board of Directors
The base for any strong chapter lies in the diversity of its membership, but the extent of a chapter’s success depends upon its officers’ ability to direct the group in setting and meeting their goals. By accepting an elected position, the board of directors agrees to be responsible for determining chapter objectives and implementing the strategies necessary to meet these objectives.

Two effective tools with which to define each officer’s responsibilities and relationships with other officers are a job description and an organization chart. Copies should be distributed to all chapter members to identify the people responsible for each chapter function. The following sample position descriptions explain the roles and responsibilities of the collegiate chapter board of directors. These position descriptions are meant for suggestion only—your chapter should establish a management structure according to your unique needs and resources. Note: All AMA chapter board members MUST be AMA collegiate members through AMA National.

President
As the chief executive officer of the collegiate chapter, the president provides leadership and overall direction. Working with the faculty advisor, he/she performs all duties required by the AMA constitution and bylaws.

Specific Responsibilities:
1. Prepares and submits a preliminary budget to the vice president of finance within two weeks of assuming office and works with the vice president of finance in presenting the annual budget to the board of directors for approval.
2. Serves as a liaison to the chapter and faculty advisor.
3. Effectively and openly communicates with the board of directors.
4. Determines whether the objectives and strategies contribute to the long-range interest of the chapter and analyzes the extent to which the needs of all members are served.
5. Makes collegiate chapter policy decisions in consultation with the faculty advisor and board of directors.
6. Appoints committee chairpersons. May call for the resignation of ineffective chairpersons with the majority approval of the board of directors.
7. Calls and conducts all general collegiate chapter and board meetings.
8. Prepares and submits a Chapter Plan and the Annual Report with input from the board of directors for final delivery to AMA. Completes the Online Officer form by May 1 for the next year (and reports any change during school year).
9. Prior to the completion of his/her term, reviews all files with the president-elect and prepares a final report, including budget estimates and recommendations for the next year.
10. Submits the Officer Report Form electronically for the upcoming year, with president-elect, faculty advisor, and second contact (VP-elect) information.

The success of the collegiate chapter depends to a large extent on the president’s skill as a manager. Planning should begin immediately following the election of chapter officers. Plans should include membership goals, special projects, budget estimates and officer transition for the following year.
We recommend having each officer sign off on their job description, serving as a binding agreement to their duties. Have the officer keep a copy and keep a copy in the chapter files.

**Executive Vice President**
The executive vice president coordinates each committee towards a collective effort and assists the president in directing the collegiate chapter, so he/she must be aware of chapter goals and objectives. To ensure continuity in chapter management, there must be an open line of communication between the board of directors and the executive vice president.

**Specific Responsibilities:**
1. Assumes the responsibilities of the president in his/her absence at all chapter functions.
2. Prepares and submits relevant information for use in the Chapter Plan and Annual Report.
3. Works closely with the vice president of programs in scheduling chapter activities.
4. Coordinates and directs the activities of all committees.
5. Calls for committee progress reports to be submitted to the president and chapter membership.
6. Attends all chapter and board meetings.
7. Prepares a final report of the year’s activities, including budget estimates and recommendations for the next year.

**Vice President of Communications**
The vice president of communications maintains the historical records of the chapter. He/she corresponds with members, AMA, and the community at large.

**Specific Responsibilities:**
1. Prepares and submits a preliminary communications budget to the vice president of finance within two weeks of assuming office.
2. With the executive vice president, selects the appropriate committee size and structure.
3. Maintains all collegiate chapter files.
4. Distributes all meeting announcements to board members, officers, faculty, and current and prospective members.
5. Attends all chapter meetings and board meetings.
6. Records the attendance of each meeting.
7. Conducts the routine of all elections including balloting.
8. Prepares and maintains the minutes of all chapter meetings and board meetings.
9. Maintains the collegiate chapter’s constitution and bylaws and reports any changes to AMA Support Center.
10. Sends chapter mailings to AMA Support Center.
11. Prepares and submits relevant information for use in the Chapter Plan and Annual Report.
12. Prepares a final report of the year’s activities, including budget estimates and recommendations for the next year.

**Vice President of Finance**
The vice president of finance is responsible for receiving and disbursing funds and managing the financial affairs of the collegiate chapter.

**Specific Responsibilities:**
1. With the executive vice president, selects the appropriate committee size and structure.
2. Prepares a preliminary budget for the collegiate chapter based on the estimates provided by the board of directors and committee chairpersons.
3. Secures signature cards and necessary papers for changing signatures at the bank after officer elections.
4. In cooperation with the vice president of membership, maintains a complete record of chapter membership and dues.
5. With the vice president of membership, submits AMA membership applications electronically and funds to AMA. (Note: ALL chapter members MUST be members at AMA Support Center.)
6. Completes a one-page budget (pro forma income statement) to be included in the Chapter Plan.
7. Attends all chapter and board meetings.
8. Communicates with the board of directors on all matters relating to chapter finances.
9. Prepares a monthly or quarterly statement of the chapter’s financial condition, which includes preliminary and actual expenditures by category. Submits copies to the president, vice president, and advisor.
10. The vice president of finance shall provide the president-elect and faculty advisor with all account information, including any necessary login and passwords, upon graduation, or before May 1; whichever is earlier.
11. Prepares a year-end report of the year’s financials including recommendations for the next year.

Vice President of Membership
Collegiate chapters prosper through new members, especially freshman and sophomore students, who will be committed to the development of the chapter for the next few years. The primary responsibility for growth rests with the vice president of membership and his/her membership committee.

Specific Responsibilities:
1. Prepares and submits a preliminary membership budget to the vice president of finance within two weeks of assuming office.
2. With the executive vice president, selects the appropriate committee size and structure.
3. Conducts an active recruiting program to accomplish the membership goals decided upon by the board of directors.
4. Provides online member application or joining information to prospective members and follows up on renewal reminders for current members.
5. Officially welcomes all new collegiate chapter members.
6. Informs the vice presidents of communications and finance of all new members and their addresses.
7. Sends AMA membership applications online process with appropriate payment to AMA Support Center.
8. Reviews chapter rosters from AMA to ensure all members are listed correctly.
9. Prepares and submits relevant information for use in the Chapter Plan and Annual Report to the vice president of communications.
10. Attends all chapter and board meetings.
11. Prepares a final report of the year’s activities, including budget estimates and recommendations for the next year.

Vice President of Programs
The vice president of programs has the responsibility for developing and implementing chapter events. Additional chairpersons may be appointed to handle special programs such as research projects and seminars.

Specific Responsibilities:
1. Prepares and submits a preliminary programs budget to the vice president of finance within two weeks of assuming office.
2. With the executive vice president, selects the appropriate committee size and structure.
3. Determines the chapter’s meeting schedule for the year in conjunction with the board of directors.
4. Selects program topics and speakers and prepares program calendar for the year.
5. Arranges for all speaker commitments and coordinates the details of their appearances.
6. Selects the specific meeting sites and attends to the details of meetings including refreshments, room requirements, room set-up, etc.
7. Coordinates meeting announcements for each program with the vice presidents of communications and advertising and promotion.
8. Arranges for appropriate recognition of speakers for their services to the chapter.
9. Attends all chapter and board meetings.
11. Prepares a final report of the year’s activities, including budget estimates and recommendations for the next year.

Vice President of Advertising and Promotion
The vice president of advertising and promotion is responsible for publicizing the events and affairs of the collegiate Chapter to the school, community and AMA Support Center.

Specific Responsibilities:
1. Prepares and submits a preliminary advertising and promotion budget to the vice president of finance within two weeks of assuming office.
2. With the executive vice president, selects the appropriate committee size and structure.
3. Develops a plan to promote chapter meetings, speakers, members and activities to the appropriate media.
4. Prepares and distributes news releases and sends copies to AMA Support Center for possible inclusion in its publications.
5. Attends all chapter and board meetings.
6. Prepares and submits relevant information for use in the Chapter Plan and Annual Report.
7. Maintains a file of all prepared news releases for succeeding vice presidents of advertising and promotion as a permanent historical file for the Chapter.
8. Prepares a final report of the year’s activities, including budget estimates and recommendations for the next year.

Many chapters find that the vice president of advertising and promotion requires a special committee that is familiar with the techniques of advertising and public relations. He/she should also work closely with the vice presidents of communications and programs.

Vice President of Careers/Placement
The vice president of careers/placement is responsible for gathering and disseminating careers and placement information, coordinating job programs, and assisting in the preparation of career programs for members.

Specific Responsibilities:
1. Prepares and submits a preliminary careers and placement budget to the vice president of finance within two weeks of assuming office.
2. With the executive vice president, selects the appropriate committee size and structure.
3. Maintains contact with college/university office of career planning and assists in the development of programs benefiting marketing majors.
4. Attends all chapter and board meetings.
5. Collects and disseminates information regarding marketing employment trends.
6. Notifies chapter membership of upcoming interviews, job opportunities, corporate visits on campus, internship/co-op opportunities and career events.
7. Arranges career days, fairs, mock interview sessions and résumé writing seminars.
8. Maintains contact with AMA chapter alumni for possible fundraising.
9. Conducts studies of alumni and employers to determine typical job responsibilities, satisfaction with education, etc.
11. Prepares a final report of the year’s activities, including budget estimates and recommendations for the next year.

Additional Officers
Officer and committee chair positions can also be created to manage chapter programs or functions that require special attention. These may include:
Social Media
The vice president of social media is primarily responsible for promoting chapter activities and engaging members and non-members through the chapter's social media channels. The vice president of social media should engage the local business community, with chapter news, projects, events, and post and speak on behalf of the chapter.

Website
The vice president of website is primarily responsible for maintaining the chapter website, keeping it up to date, and making sure it links to the AMA National website, and aligns with the AMA National Brand.

Role of the Faculty Advisor
The advisor has a role consisting primarily of support and guidance, allowing students to learn through their own successes and failures. He/She is required to be a member of AMA and serves as the liaison between the chapter and AMA Support Center. The faculty advisor works closely with the chapter's board of directors and is a major resource for the board members.

The position of faculty advisor should be maintained for at least one full school year. If it becomes necessary to change advisors during the year, please re-submit via the Officer Report form.

Specific Responsibilities:
1. Certifies that all required reports to remain affiliated are sent to AMA
2. Distributes materials and information from AMA to chapter members.
3. The Advisor shall insure that all chapter members are becoming members of AMA National.
4. Manage all succession planning, including elections each April, and handing over of all information at the end of the Spring semester to the President-Elect.
5. Works with president and officers to ensure that chapter goals and objectives are met.
6. Helps to coordinate programs with other AMA collegiate and professional chapters.
7. Helps to promote the chapter on campus and within the business community.
8. Assists the chapter with activities such as membership drives, finances, officer transition and other functions as needed.

Board Responsibilities
The board of directors must communicate regularly to determine goals and coordinate plans. The board must lead by example by demonstrating enthusiasm for the chapter and its activities, making responsible decisions and thinking about the chapter’s long-term success.

Planning Elections
Make plans for officer elections early in the spring semester. Scheduling elections in the beginning of the spring semester provides next year’s officers with the opportunity to work with the person currently holding the position and learn while the job is being performed, rather than waiting until the end of the semester. Another reason to hold elections early is so next year’s officers can plan to attend the International Collegiate Conference. Incoming officers who attend will hear new ideas on how to run a successful collegiate chapter and can attend the leadership sessions that relate specifically to the roles they will be assuming.

Promote the election. Current officers should openly and actively promote scheduled elections, which could include announcements of available positions by the committee chairs at meetings and in the chapter newsletter. Current officers should prepare written descriptions of their positions and duties so that interested students have a clear
understanding of the position requirements and can think carefully about whether they have the time and talents and can make the commitment to do the work.

Presentations. Each officer should make a presentation about his/her position and related duties at a meeting. At this same meeting, current officers should take nominations and then prepare a ballot (with room for write-ins) for the election meeting. Candidates should be assigned a time to give their campaign speeches either at the election meeting or prior to that meeting if time permits.

Officer Transition
A sure way to improve and strengthen chapter management is to contemplate the end of officers’ terms as soon as they begin.
Officer transition can be handled in several ways:

1. Officers-elect are chosen prior to the date their term actually begins (one quarter or semester in advance) so they can fully prepare by interacting with current officers.
2. Past officers remain on the board after their term ends to orient new officers to their duties.
3. Committee chairs are groomed for board of director positions as part of current responsibilities. They attend meetings, file reports, etc., in the same manner required of the board of directors.
4. Detailed position descriptions are required of all officers before their terms are completed. Reports are handed to each successive new officer and include information on budgets, committee members, business contacts and recommendations for future plans, etc.
5. Old and new officers meet to train and exchange ideas.

Efficient officer transition involves regular communication with AMA. The Officer Report Form is to be completed online at www.ama.org/collegiate after elections are complete. This will ensure that the faculty advisor and new president receive important email communications from AMA prior to the Fall semester.

Chapter Affiliation
A major responsibility of the board is to ensure that the chapter’s affiliation is up-to-date with AMA. Details on the requirements for remaining affiliated are listed earlier in this manual.

Planning and Implementing Goals and Strategies
Strategic Planning. The American Marketing Association encourages all collegiate chapters to think strategically while planning chapter activities and programs to make best use of available resources and meet members’ needs. Officers must analyze the chapter’s past and present situation and major strengths/weaknesses in order to determine goals and plan strategies. Once the board of directors determines the chapter’s current situation, they must set objectives for the year -- and beyond. A major function of the board of directors is to establish the Chapter Plan with clear, precise chapter goals.

Specifying Goals. The Chapter Plan should describe goals for various areas: membership, programming, attendance, communications, finances, advertising and promotion and career placement. To develop a strategy for each, the board of directors must answer several questions: What are the chapter’s goals? How do we plan to achieve them? What methods will be used? When should the goals be achieved? Who is responsible for each strategy? How will success be measured? The answers to these questions will help each officer detail the plans for his/her responsibilities. The board should work together to organize the reports from each committee into a cohesive Chapter Plan that will direct the entire chapter.

Status Reports. Members should be familiar with the Chapter Plan and be encouraged to help with its implementation. They should also be regularly updated on program progress.
Officers and committee heads should give reports on their projects at chapter meetings to announce progress made and what extra steps may be necessary to reach each goal. The president should monitor the chapter’s overall productivity by periodically checking the progress of each officer and committee.

**Final Reports.** As the year draws to a close, officers must analyze the progress the chapter has made. Each committee should submit a final report of its activities for inclusion in the chapter’s Annual Report. The report will help the board assess the chapter’s standing in each management area and prepare for the next year. The Annual Report also becomes part of chapter historical records to provide guidance for future administrations.

**Managing Chapter Finances**

A sound budget makes programs and new projects possible; consequently, the board of directors should use special care to analyze the chapter’s financial standing and set financial goals. To ensure financial responsibility, each officer and committee should prepare a budget report at the start of the year containing an estimate of the income and expenses it will incur. The collegiate chapter’s board of directors must then approve each budget, with careful consideration given when committee expenses outweigh income. The board can combine each committee budget into an overall chapter budget for the year.

**Nonprofit Status**

Chapters operate under the auspices of their college/university, which makes chapter operations separate from those of AMA National. Therefore, chapters do not qualify for Nonprofit status under AMA National’s tax exemption certificate. However, in most cases, the chapter can obtain nonprofit status through the college/university. Check with University administration.

If your AMA collegiate chapter is interested in applying for nonprofit status with the Internal Revenue Service (IRS), you must first obtain your own tax ID number. Each collegiate chapter must file for a tax ID number on an individual basis -- the American Marketing Association cannot provide Chapters with a tax ID number or federal filing number. Chapters can obtain nonprofit status by doing one of the following:

1. Call or visit your college/university business office and ask what the school's policy is regarding student clubs and organizations on campus. In some cases, your college/university may automatically designate student clubs and organizations as nonprofit. If this is the case, your business office should be able to provide you with a tax filing number.
2. If your organization is not already designated as nonprofit through your college/university, ask if the School has the necessary forms to complete.
3. Call or visit a local bank (preferably the one where your chapter has a checking account) and ask what the procedures are to obtain a tax ID number for nonprofit status.
4. Call the IRS in your state and ask them to send you the necessary paperwork to obtain nonprofit status. Information is also often online at the state IRS web site.

There are several forms that your chapter will have to complete and file with the IRS prior to receiving a tax-exempt filing number. Apply as soon as possible, as it may take four to six weeks for processing and approval.

**Income and Expenses**

Timing. Effective budgeting involves managing expenses and income and paying bills in a timely manner to maintain the chapter’s professional reputation. To expedite the process,
become familiar with the college/university’s accounting schedule if your chapter depends on its funds or check-writing services to pay chapter bills.

**Expenses.** Typical chapter expenses include paper and other supplies; printing, mailing, advertising and promotion costs; speaker fees, travel and accommodations; phone bills; food and refreshments; International Collegiate Conference expenses; chapter gifts and awards; and room and equipment rentals.

**School Budget Support.** In most cases the college/university or student government has a budget for collegiate activities. Chapter officers should request a specific amount of funding after investigating the size and programs of other organizations and the financial allocations obtained. Former requests by AMA officers should also be analyzed. Adjust your chapter’s request for school funds to adhere to this data and the chapter’s needs.

**Other Sources of Funding.** Funding aside from chapter dues provides greater flexibility in planning programs. There is no harm in asking for money, so don’t be afraid to try! Possible sources of income include: chapter projects, such as research, advertising, and sales, conferences, socials and other events, donations from local businesses, college/university donations, student government funding, alumni donations, and foundation and grant funding. **Financial contributions and donations are important, but it is the chapter's projects and membership dues that keep the organization solvent.** The chapter should not solely depend on outside income for its operation because chapter programs may need to be eliminated if outside support dwindles. Instead, officers should implement worthwhile fundraising projects to support chapter activities.

**Membership Dues**
There are two specific and different types of dues payments chapter members make:

1. **Your Chapter Dues.** Although not all chapters set chapter dues, a major source of income for collegiate chapters is chapter dues. These dues vary, depending on the services provided and the expenses required of the chapter. Your chapter dues must be handled directly by the chapter’s vice president of finance and must not be submitted to AMA.
2. **AMA National Dues.** As of July 1, 2017, AMA Collegiate membership dues are $50 per year (plus any local chapter dues).

**Managing Membership Dues**
Your chapter will be responsible for submitting membership applications online for new members, following up with current members to see that they keep their membership active, and perhaps helping graduating students upgrade to Young Professional membership status. Processing and submitting membership applications to AMA is a simple process if the recommended guidelines are followed:

- **New Member Online Applications.** AMA collegiate applications are reserved for new members only. Online applications can be completed by visiting the AMA [online](#). When you join and register for the AMA online, don’t forget to include the full official name of your college or university; otherwise a new member may not be properly credited to your chapter. (Note: When submitting payment via mail, keep in mind that AMA supports over 300+ collegiate chapters, and it is not apparent to people processing checks which school you go to; especially if there are two or more chapters associated with your college or university system.)

- **Current Member Renewal.** AMA members are billed annually for membership dues. Current AMA collegiate members receive a renewal invoice for their next year of
membership 60 days prior to their membership expiration date. Renewal invoices are automatically sent from AMA to a member’s most current email address on record.

The vice president of membership can use the roster proactively by letting students who are within 60 days of expiration know that a renewal notice from the AMA is on its way. It is important to encourage them to renew membership before it lapses so there are no interruptions in benefits. Renewals can also be done online or by contacting the AMA Customer Support Center at: 800.AMA.1150.

Please note that all chapter members must pay AMA national collegiate membership dues to be officially counted and recognized by the Association as an AMA member. This is an agreement the chapter made when affiliating with the AMA.

**Collecting Dues**

Whether students are joining for the first time or renewing their memberships, chapters must follow certain requirements to ensure that AMA membership dues are processed as quickly as possible.

Here are some steps you can follow:

- Completed membership applications for new members and corresponding payment should be sent promptly to the American Marketing Association, Collegiate Division, 130 E. Randolph St., 22nd Floor, Chicago, IL 60601 (Note: expedite member applications and payment via email – submit ALL electronic documentation to: collegiate@ama.org or join the AMA by visiting us online.)
- Checks or money orders must be payable to the American Marketing Association payable in U.S. funds.
- **The full proper name of the student’s college or university** must appear on each online application or renewal in order to be credited to your chapter.
- **Membership or renewal forms created by your chapter will not be accepted.** Please use the online membership applications located here.
- Membership applications may be submitted at any time during the year. Please allow 3 weeks for processing.

The vice president of finance is responsible for processing membership payments and allocating the funds to the appropriate organizations, the collegiate chapter and AMA National. This process applies to new member applications as well as renewal invoices.

Note: To expedite new member applications, please submit your online AMA application. If mailing applications, please inform us at collegiate@ama.org and mail ALL documentation/applications with payment (made out to the American Marketing Association) to the address below:

American Marketing Association  
c/o: Collegiate Division, 130 E. Randolph St, 22nd Fl., Chicago, IL 60601  
Re: University/College Name – New Member Application(s)

Please use one of the two methods below for submitting payment for membership dues to AMA:

1. **Collect one payment** -- Each member pays once for AMA National and chapter dues. All money collected is deposited into the chapter’s account. The vice president of finance then prepares one check to cover AMA membership dues, along with any extra fees such as those for publications or professional chapter membership dues. This **group check** is submitted toAMA with the appropriate applications.

2. **Collect two payments** -- Each member submits a check payable to the American Marketing Association or credit card, and a second payment is made to your collegiate chapter to cover
chapter dues. Payment to AMA should be attached to the appropriate application. Any cash payments should be deposited in the Chapter’s account and paid to AMA with a check from the Chapter.

**Keeping Accurate Records**

The vice president of finance and the vice president of membership should keep a record of when each student joins as an AMA member. Each record should be updated to include all payments the member makes to the chapter as well as to AMA Support Center. This will ensure that chapter dues are collected from renewing members.

**Financial Records**

**Financial System.** An established financial system followed by all officers and committee heads will keep the chapter’s budget organized. Key parts of this system are a chapter bank account with two co-signers (usually the vice president of finance and the president) and the regular reporting of chapter income and expenses. The vice president of finance should receive monthly or quarterly committee budget reports that show how much money has been spent and for what purpose as well as how much money has been earned. The data from each report should be combined to reveal the chapter’s overall financial picture.

**Records.** Accurate records of monies spent should be kept by all officers and chapter members with financial responsibility. Each payment made should be backed up by a written invoice and receipts if appropriate, which should be given directly to the vice president of finance for chapter records. At the end of the year, the vice president of finance should draft a financial statement that indicates the chapter’s overall financial status, how well it succeeded in meeting financial plans and goals and make recommendations for the coming year. They shall turn over all documents and needed logins/passwords to the President-Elect, by May 1 or before they leave for the summer, whichever is earlier.

**Chapter Membership Rosters**

The AMA can provide each chapter with periodic member rosters throughout the year. Send your request, stating your position with the chapter and full college/university name to collegiate@ama.org.

**How to Read a Chapter Roster.** The membership roster includes the following information for all active AMA members:

- Primary telephone number and mailing address
- Secondary telephone number and mailing address
- Email address
- Membership expiration date
- Member ID

The vice president of membership can use this information to see that students’ mail is sent to the correct address. But more importantly, he can track all expiration dates for the year to follow when students will need to renew their AMA membership. If a student does not appear on a Chapter roster, it typically means:

- The student’s membership has lapsed.
- The school name was not listed on application so proper chapter code was not assigned.
- Payment was not received, or renewal was not completed.

Contact the AMA Customer Support Center info@ama.org or call: 800.AMA.1150 to make the appropriate corrections.

If contact information is incorrect, please have the student update their profile online with the correct information or contact the AMA Customer Service at info@ama.org.
CHAPTER AND ADVISOR RECOGNITION

COLLEGIATE CHAPTER ANNUAL AWARDS PROGRAM
PREPARING YOUR CHAPTER PLAN
PREPARING YOUR ANNUAL REPORT
CATEGORIES OF RECOGNITION
OTHER COMPETITIONS AND AWARDS
ACTIVITIES FOR COLLEGIATE CHAPTERS
The AMA recognizes the work of chapters and chapter officers in many ways. In this section, you will learn what the recognition levels are and how to achieve them.

Questions answered in this section:
• How is my chapter recognized for completing annual renewal requirements?
• What is the Annual Awards Program and how does my chapter enter?
• In what areas can my chapter be recognized?
• How can my chapter’s faculty advisor be recognized nationally?

Collegiate Chapter Annual Awards Program

The Collegiate Chapter Annual Awards Program recognizes and honors AMA collegiate chapters excelling in specific areas of chapter management and programming. All collegiate chapters are eligible to compete upon submission of two documents: the Chapter Plan and the Annual Report. Complete details on the program and the guidelines to prepare these documents are listed at www.ama.org/collegiate.

Awards Program Objectives
• To recognize and honor those AMA collegiate chapters excelling in service to their members, their university and their marketing community.
• To promote professionalism within collegiate chapters by requiring participation in the planning process from chapter plan through annual report.
• To promote professionalism in activities with more attention to goals and well-balanced chapter performance.

All currently affiliated AMA collegiate chapters must complete the Chapter Plan and Annual Report (by the deadlines listed on AMA’s website) to retain AMA chapter status. This is true if being judged for competition or not.

Chapter Plan
The Chapter Plan is intended to focus the chapter’s attention and efforts on what needs to be accomplished in the academic year and how to achieve these goals. The Chapter Plan is designed to assist chapter leadership and members in developing their chapter goals and the strategies that will be used to achieve those goals. Keep in mind that the Annual Report is judged according to the evaluation and achievement of objectives as stated in the Chapter Plan. A successful plan clearly defines the chapter’s strengths and weaknesses, and how the chapter plans to overcome and/or take advantage of these. Chapter Plans and Annual Reports from past top schools can be found online at ama.org. Reviewing these can be helpful to understanding what makes a good chapter tick, and what top chapters are doing. The following areas must be addressed in the Chapter Plan:

• Summary of chapter strengths and weaknesses
• Professional Development
• Community Service and Social Impact
• Fundraising
• Membership
• Internal/external communications
• Chapter Operations
• Calendar of Events
• Pro Forma Budget
• Presentation

Entries are due in PDF format each fall. Please see the Chapter Plan rules, deadline dates and guidelines at the Chapter Reporting section at ama.org/collegiate.
**Annual Report**
The Annual Report reviews and analyzes the results of chapter activities based on the objectives stated in the Chapter Plan. The Annual Report is judged according to the achievement of objectives and activities as intended in your Chapter Plan. The rules and guidelines for writing the Annual Report can be found at the Chapter Reporting section of [ama.org/collegiate](ama.org/collegiate). The following must be included in the Annual Report:

- Executive Summary and Summary of programs and Achievements in the following:
  - Professional Development
  - Community Service and Social Impact
  - Fundraising
  - Membership
  - Internal/External Communications
  - Chapter Operations
  - Summary of Financial Results
  - Presentation

Entries are due in PDF format, typically in late February. For a complete list of rules, deadline dates and guidelines, see the Annual Report guidelines at [ama.org/collegiate](ama.org/collegiate).

**Categories of Recognition**
Chapters submitting a Chapter Plan and Annual Report are eligible to participate in the Annual Awards Program in the following categories:

- Chapter Planning
- Community Service and Social Impact
- Fundraising
- Membership and Communications
- Professional Development
- International Chapters of the Year
- Functional Awards
- Top 25 Chapters
- Top Small Chapter of the Year
  - Top 5
  - Top 10
  - Top 15
  - Top 20

... and more, as the collegiate chapters Council is always refining the Awards Program to award chapters for their great work.

All awards are presented at the Annual International Collegiate Conference each spring - attendance is not mandatory to win an award!

**Other Awards and Competitions**

**Collegiate Website Award**
The Collegiate Chapter Website Competition is one of the AMA's most valuable competitions. After all, your chapter’s website is one of your most important communication tools. See how it stacks up to other AMA student chapters and get professional feedback.

Sites will be evaluated on Aesthetics, Content/functionality, Engagement, connection to the AMA national website, and other required elements.

Check the [Awards & Competitions](ama.org/collegiate) webpage for more information and deadline dates.

**Collegiate Chapter Exhibit Competition**
The Collegiate Chapter Exhibits, held on the Thursday evening of the International Collegiate Conference is a "don't miss" highlight of the Conference! These exhibits, presented in trade show fashion by AMA collegiate chapters, give your chapter an opportunity to be creative
and show off your accomplishments. Your fellow students, as well as guest judges will select the winners!

Registration is limited. Check the Awards & Competitions webpage for more information and deadline dates.

**AMA Sales Competition**
The AMA Sales Competition is designed to encourage and recognize the professional sales presentation. Participants will be judged on their ability to 1) Gain the Prospect’s Attention, 2) Develop Prospect’s Interest, 3) Establish and Qualify Prospect’s Needs, 4) Building the Sale, 5) Market the Solution, and 6) Closing the Selling Cycle.

Registration is limited. Check the Awards & Competitions webpage for more information and deadline dates.

**SABRE™ Business Simulation Competition**
SABRE™, (which stands for Strategic Allocation of Business Resources), is a market simulation developed by IIBD, and used in IIBD’s executive courses, and in MBA programs worldwide. Teams of students are invited to participate in the SABRE™ business simulation, which is used at leading business schools, including Wharton, University of North Carolina and University of Michigan.

SABRE™ provides the competitive environment which immerses the participants in a dynamic competitive situation. Teams may add and withdraw products from the marketplace, as well as advertise, price, distribute, and design those products to best fit varying market segments. This is a dynamic team activity, with immediate feedback and guidance from IIBD experts.

Registration is limited. Check the Awards & Competitions webpage for more information and deadline dates.

**Chapter T-Shirt Competition**
Chapters are encouraged to design and print their own T-shirts to bring to the International Collegiate Conference! Students will have the opportunity to meet and exchange t-shirts with fellow AMA members at the Conference. This is a great way to get to know other chapters, as well as getting some cool T-shirts. The chapter that designs the winning T-Shirt wins a reserved table, front and center, at the Conference Awards Banquet.

**AMA Student Marketer of the Year**
The Student Marketer of the Year award focuses attention on the varieties of ways AMA Collegiate members demonstrate excellence and commitment to their AMA chapter’s mission and the Collegiate Chapters’ Division mission. The Award recognizes AMA Collegiate members who demonstrate superior leadership, service to AMA, academic achievement, and impact on their community. Award recipients are recognized at the Annual Collegiate Conference.

Each chapter may submit one entry only.

**AMA Marketing Week**
Marketing Week is celebrated annually by chapters of the American Marketing Association, one of the largest professional associations for marketers with over 30,000 members worldwide. Marketing Week is a chance for collegiate chapters to showcase both the variety and depth of opportunities in careers in Marketing as well as to highlight the benefits of AMA membership. Marketing Week typically is celebrated in October.

Check the Awards & Competitions webpage for more information and deadline dates.
Case Competition
The AMA Case Competition pairs a corporate sponsor with AMA Chapters. AMA student teams are challenged to develop a plan to address the opportunity provided by the sponsor. The competition culminates at the AMA International Collegiate Conference with presentations from the finalist teams to judges from the sponsoring organizations. Finalist teams receive a cash prize. The Case Competition begins with the announcement of the Case Brief mid-summer. Chapters must submit the Intent to Participate form in order to gain access to the Case Question (the full Case). All AMA affiliated collegiate chapters may participate. Finalist teams of five people must be available to present their Case at the International Collegiate Conference.

Registration opens in mid-July. Check the Awards & Competitions webpage for more information and deadline dates.

Hugh G. Wales Faculty Advisor Award
The AMA established the Hugh G. Wales Faculty Advisor Program in 1977. Because the participation of faculty advisors is so critical to the success of AMA Collegiate Chapters, AMA recognizes outstanding faculty advisors for their contributions. The Award is presented at the Annual International Collegiate Conference each spring and includes a cash prize for the recipient. Students can nominate their faculty advisor by submitting a nomination essay that describes the advisor's abilities in the following areas:

- Chapter Guidance Officer
- Training
- Planning Assistance
- Motivation
- Communication with Chapter Constituents
- General Support of the Chapter
- Any other areas of significant contribution

Before faculty advisors are nominated, they must have two consecutive years' experience advising an AMA Collegiate Chapter. Current CCC members and previous recipients of the Faculty Advisor of the Year and Outstanding Faculty Advisor Awards cannot be re-nominated.

AMA Outbound Sales Competition
The competition, sponsored by an AMA Corporate Partner takes place in mid-October, and is designed to improve students' telephone communication skills. 250 AMA students' members will be able to complete, first come, first serve.

Registration opens in early-September. Check the Awards & Competitions webpage for more information and deadline dates.

Outstanding Marketing Week Competition
Marketing Week competition is traditionally held the first full week in October and serves as an awareness/recruitment time for your AMA chapter. To enter the Outstanding Marketing Week Activities competition the chapter needs to provide a two-page (maximum) summary report (1-inch margins, double spaced, 12-point font).

The summary report should include:

- The goals established for Marketing Week (quantify)
- A detailed list of social media activities around your Marketing Week and member recruitment promotions
- A list of the activities planned, including any goals specific to individual activities, target audience, location of event, etc.
- Details of how the activities were executed
- Evaluation of the results of the activities in terms of the stated goals

To submit your Chapter’s entry, check the Awards & Competitions webpage for more information.
AMA Sales & Marketing Roundtables
The AMA Sales & Marketing Roundtables is a great professional development opportunity for your chapter members to connect and network in small groups with sales and marketing professionals around tropics related to sales, career development and various marketing hot topics. Online registration is limited!

Registration opens in early-January. Check the Awards & Competitions webpage for more information and deadline dates.

Perfect Pitch Competition
The competition, sponsored by an AMA Corporate Partner is a 90 second interview in which you position yourself as being “right for the job”. Like an elevator pitch competition, your goal is to provide a 2-3 key selling points as to why you are the ideal candidate and then support these qualifications with exemplars.

Registration will open in mid-January. Check the Awards & Competitions webpage for more information and deadline dates.

Marketing Strategy Competition
The Marketing Strategy Competition will challenge your wit, speed, and presentation skills while leveling the playing field for all schools - big, small, commuter - many resources to no resources. Each team (maximum of 2 people per team, maximum of one team per chapter in the whole competition and sign up for an AM or PM time slot, but not booth). Teams will receive a 1-page mini-case based on a fictional company. Teams will have 20 minutes to create a strategy to solve the problem within the case before going in front of the judging panel to present your ideas. The oral presentation will be 7 minutes max (no visual aids) - it’s solely based on your ideas, knowledge and ability to communicate those ideas. Best presentations will advance to semi-finals and finals rounds.

Registration for AM or PM slots are limited and will open early-January. Check the Awards & Competitions webpage for more information and deadline dates.

Student Poster Session
The AMA Student Poster Session is a great opportunity to showcase the research you have done in the field of marketing. This competition is open for individual or team presentations.

Registration will open in mid-December. Check the Awards & Competitions webpage for more information and deadline dates.

ICC Digital Marketing Boot Camp
This engaging, interactive and immersive session will not only equip you with the latest thinking in digital marketing strategy, but it will also prepare you to become an AMA Professional Certified Marketer® in Digital Marketing. Adding the letters P-C-M behind your name shows you’re serious about making a difference in the industry and this boot camp is a great first step in making it happen. Online registration is available and limited!

Registration will open in early-January. Check the Awards & Competitions webpage for more information and deadline dates.

Chapter T-Shirt Competition
The competition encourages chapters to design a T-Shirt that represents their chapter (or University) spirit. All chapters who wish to compete in this competition must pre-register and submit a photo of the font and back of the T-Shirt.

Submissions will open in early-December. Check the Awards & Competitions webpage for more information and deadline dates.
Best Recruitment and Social Impact Video Competition
This competition offers chapters the opportunity to build their Recruitment and Social Impact efforts through two video competitions. These competitions also aligns with AMA’s new Social Impact Scholarship designed to promote the well-being of individuals and society.

Submissions will open in early-December. Check the [Awards & Competitions](#) webpage for more information and deadline dates.

AMA USCA Sales Student of the Year
The competition, sponsored by an AMA Corporate Partner is the AMA/USCA Sales Student of the Year Award which recognizes AMA Collegiate members who demonstrates superior exposure to and participation in sales-related events. Award recipients are recognized at the Annual International Collegiate Conference, but do not need to be present to be nominated and awarded.

Nominations will open in early-January. Check the [Awards & Competitions](#) webpage for more information and deadline dates.

Scholarships
Consideration for scholarship awards shall be based on criteria established by the AMA-CCC Scholarship & Awards Committee.

AMA EBSCO Marketing Scholar Award
The Collegiate Chapters Council (CCC) of the AMA is excited to announce the continuation of the AMA-EBSCO Marketing Scholar Award and will be awarded to three deserving candidates.

AMA Social Impact Scholarship
The AMA is committed to transforming students into marketing professionals who are good at what they do while doing good in the process. Two scholarships will be awarded to two-student members who have excelled in making a positive impact in their local, regional or larger community.

AMA Diversity Leadership Scholarship
The AMA will deliver two diversity leadership scholarships and will award students who have demonstrated AMAzing leaderships as part of their chapter activities or in other venues (e.g., consulting, course projects, internships, jobs, etc.).

Scholarship qualifications and eligibility guidelines are listed under each scholarship program. Check the [Awards & Competitions](#) webpage for more information and deadline dates.
CHAPTER FORMS

MOST AMA FORMS ARE HOUSED ON THE AMA’S STUDENT RESOURCE CENTER. YOU CAN REQUEST EDITABLE VERSIONS OF FORMS BY EMAIL AT COLLEGIATE@AMA.ORG

SAMPLE CHAPTER BUDGET
SAMPLE COLLEGIATE CHAPTER PROJECT TIMELINE/PLANNING SHEET
SAMPLE JOB DESCRIPTION FOR REGISTRAR AT CHAPTER EVENT
END OF YEAR MEMBER SURVEY
# Sample Chapter Budget

<table>
<thead>
<tr>
<th>Income</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member Dues</td>
<td>$8,125.00 125 members @ $50 national (and $15 local)</td>
</tr>
<tr>
<td>Regular Meetings</td>
<td>$630.00 7 meetings at $2.00 each x 45 people</td>
</tr>
<tr>
<td>Speakers, Lectures</td>
<td>$300.00 Two speakers, $5.00 ticket x 30 people</td>
</tr>
<tr>
<td>Advertising</td>
<td>$525.00 3 ads in e-newsletter x 7 months at $25.00 each</td>
</tr>
<tr>
<td>Sponsorships</td>
<td>$1,000.00 $300 from two companies; $400 from one company</td>
</tr>
<tr>
<td>Fundraising Events</td>
<td>$500.00 $300 from &quot;Spring Fling,&quot; $200 from two pizza parties</td>
</tr>
<tr>
<td>Interest</td>
<td>$125.00 $2000 in bank for one year</td>
</tr>
<tr>
<td>Other:</td>
<td>$50.00 Miscellaneous donations</td>
</tr>
</tbody>
</table>

**Total Income:** $11,255.00

<table>
<thead>
<tr>
<th>Expenses</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Dues</td>
<td>$6,250.00 125 members @ $50 each</td>
</tr>
<tr>
<td>Regular Meeting Snacks</td>
<td>$175.00 7 meetings x $25.00</td>
</tr>
<tr>
<td>Speaker fees, lecture fees</td>
<td>$750.00 Two speakers: $250 and $500</td>
</tr>
<tr>
<td>Advertising</td>
<td>$50.00 Copies</td>
</tr>
<tr>
<td>Sponsorships</td>
<td>$120.00 Two free pizza tickets at $10 x 6 sponsors</td>
</tr>
<tr>
<td>Fundraising Events</td>
<td>$450.00 See detailed expenses; &quot;Spring Fling&quot; at $150; two pizza parties @ $288</td>
</tr>
<tr>
<td>Collegiate Conference</td>
<td>$2,000.00 5 partial scholarships at $400 each</td>
</tr>
<tr>
<td>Exhibition competition</td>
<td>$225.00 Various Supplies</td>
</tr>
<tr>
<td>Case Competition Expenses</td>
<td>$125.00 Various supplies</td>
</tr>
<tr>
<td>Supplies</td>
<td>$75.00 Paper, badges, receipts, printing</td>
</tr>
<tr>
<td>Equipment</td>
<td>$25.00 Need new calculators for registrars</td>
</tr>
<tr>
<td>Bank Charges</td>
<td>$114.00 $8 checking monthly, plus check costs @ 50 cents x 3 checks a month</td>
</tr>
</tbody>
</table>

**Total Expenses:** $10,359.00

**Total Income/(Expenses)** $896.00
## Sample Collegiate Chapter Project Timeline/Planning Sheet

<table>
<thead>
<tr>
<th>Action Items</th>
<th>Programming</th>
<th>Promotion</th>
<th>Operations</th>
<th>Sponsorship</th>
<th>Membership</th>
<th>Web</th>
<th>Treasurer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Topic Decided</td>
<td>90-days or more</td>
<td></td>
<td></td>
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<tr>
<td>Identify Potential Sponsors to meet budget</td>
<td></td>
<td></td>
<td>90 days or more</td>
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<tr>
<td>Secure Venue</td>
<td>60 days or more</td>
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<tr>
<td>Signed Speaker Agreement</td>
<td>60 days</td>
<td></td>
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<tr>
<td>Secure Sponsors, Collect all Funds Due</td>
<td>60 days</td>
<td></td>
<td></td>
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<tr>
<td>Speaker Bio/Topic Outline</td>
<td>60 days</td>
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<tr>
<td>Obtain Sponsor Logos</td>
<td>45 days</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Write Invitation Copy</td>
<td>60 days</td>
<td></td>
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<tr>
<td>Print Invitations, Posters, Banners, Etc.</td>
<td>30 days</td>
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<tr>
<td>Mail Invitations</td>
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<td>Reminder e-Mail</td>
<td>15, 10, 5 days</td>
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<tr>
<td>Obtain Speaker A/V Requirements</td>
<td>15 days</td>
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<tr>
<td>Obtain Copy of Speaker Handout Materials</td>
<td>15 days</td>
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<tr>
<td>Secure A/V Equipment as Required</td>
<td>15 days</td>
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<tr>
<td>Establish Registration Process</td>
<td>30 days</td>
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<tr>
<td>Report Registration Headcount</td>
<td>15, 10, 5, 3 days</td>
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<tr>
<td>Order</td>
<td>5, 3 days</td>
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</tr>
<tr>
<td>Food/Beverages</td>
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<td>Update Website with Program Announcement</td>
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<td>21 days</td>
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<td>Secure Membership Table/Information</td>
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<td>3 days</td>
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<tr>
<td>Maintain Budget, Report Variances</td>
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<td>15, 5, 3 days</td>
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<tr>
<td>Prepare Registration Table Materials</td>
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<td>Day of</td>
</tr>
<tr>
<td>Process Onsite and Pre-Registrations for Attendees</td>
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<td>Day of</td>
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<td>Process Onsite Payments</td>
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<td>Day of, 1-2 days after</td>
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<tr>
<td>Reconfirm Venue, Food/Beverage, Room Setup, A/V Requirements</td>
<td>3 days</td>
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<td>Reconfirm Speaker Arrangements</td>
<td>3 days</td>
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<tr>
<td>Greet Attendees</td>
<td>Day of</td>
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<td>Day of</td>
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<td>Setup and Monitor Membership Table</td>
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<td>Day of</td>
</tr>
<tr>
<td>Test A/V Equipment, Confirm Timing Schedule</td>
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<td>Day of</td>
</tr>
<tr>
<td>Update Database with Attendee Information</td>
<td></td>
<td></td>
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<td></td>
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<td>2 days after</td>
</tr>
<tr>
<td>Thank You Letters to Sponsors</td>
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<td>2 days after</td>
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<tr>
<td>Update Website</td>
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<td>Day After</td>
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<tr>
<td>Report Final Accounting</td>
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<td></td>
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<td>5 days after</td>
</tr>
</tbody>
</table>
Sample Job Description for Registrar at Chapter Events

Thanks for volunteering! We need you and thank you in advance. If you have any suggestions on how to make these directions clearer or how to make this volunteer job better, please just let us know.

**Primary Job:** The registrar checks people in for events, takes cash/checks, and keeps a list of payments.

**Equipment needed:**
- Registration list (get from Treasurer) with paid/unpaid amounts
- Pens/Notebook(s)
- Name badges
- Calculator
- Cash box with $35.00 in cash (and change, if applicable)
- Credit card wipe machine
- Table and chairs
- Any signage needed (direct traffic, session rooms, registration desk, etc.)

**Directions:**
1. Pick up the supplies box from the chapter supply room. Get the cash box and reservation list from (person, place).
2. Arrive 30-45 minutes before the event.
3. Set up the table and chairs for registration.
4. Set out the name badges/blanks with several pens.
5. If more than one person is taking in registrations, and there are many people, use several lists. For really big crowds, try A-J, K-P, R-Z signs overhead.
6. Use this system:
   a. For people who have already registered and paid and are checking in, use a check mark.
   b. For people who have registered, but not paid, write “$” for cash or “Ck” for check or “CC” for credit card to the left of the name and the amount after the name.
   c. For people who have not registered or paid, write in their names and note them as above.
   d. For people who say that they have paid, believe them and write down their names as above.
7. Invite people to make out name badges.
8. Add credit card processing info if your chapter has a card reader.
9. Stay in the back of the room with the cash box and list and continue to register people who come in late.
10. Put all supplies (pens, unused name badges, etc.) back in the box and return the supply box to the chapter office. If the office is locked, return it later; but keep the cash box safe overnight.
Sample End of Year Member Survey (consider doing this via an online survey provider)

1. How satisfied were you with your overall experience as an AMA Chapter member?
   - Very Unsatisfied
   - Somewhat Unsatisfied
   - Neutral
   - Somewhat Satisfied
   - Very Satisfied

2. How did you like the programs this year, overall?
   - Very Unsatisfied
   - Somewhat Unsatisfied
   - Neutral
   - Somewhat Satisfied
   - Very Satisfied

3. What was the best program?

4. What was your least favorite?

5. Ideas for future programs?

6. If you did not attend events, or very few events, why?

7. How did you feel about prices for Chapter activities?
   - Very Unsatisfied
   - Somewhat Unsatisfied
   - Neutral
   - Somewhat Satisfied
   - Very Satisfied

8. Did you volunteer for activities this year?
   - Yes
   - No

9. If yes, how was your volunteer experience?
   - Very Unsatisfied
   - Somewhat Unsatisfied
   - Neutral
   - Somewhat Satisfied
   - Very Satisfied

10. What could have been better?

11. What did you gain from being a member? (Please check all that apply):
   - New Friends
   - Leadership Skills
   - Speaking Skills
   - Self-Confidence
   - Professional Development
   - Organizational Skills
   - Other:

12. Would you be interested in volunteering? (Please check all that apply):
   - Programming
   - Membership
   - Fundraising
   - Marketing Week
   - Other:

Contact Name: ________________________________
Email: ________________________________
Phone Number: ________________________________