



2011-12 Chapter/Network Handbook

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...that the Texas Exes strives to enhance the student experience by providing meaningful involvement through the Texas Exes Student Chapter, Camp Texas, Spirit & Traditions Council, student and faculty awards, alumni mentoring programs, and leadership development? During the 2010-11 school year, the Texas Exes Student Chapter recruited nearly 2,000 dues-paying members and provided programming ranging from job shadowing to dinner programs with alumni to campus-wide spirit rallies. Camp Texas continues to provide incoming freshmen with meaningful interaction with UT faculty and staff, as well as important leadership development. For an informative video news report on Camp Texas, please visit <http://www.texasexes.org/camptexas/attend.asp>.

Q. How do local chapters benefit from membership?

- A. It is through membership dues that Texas Exes is able to offer support for the local chapters. This support comes in the form of maintaining the alumni database, sending emails for chapters, chapter websites, and the 2 free mailings that each chapter gets annually. None of this would be possible without dues-paying members.

More detailed information on Membership is available on page 13 in the Reference Section.

Texas Exes Expectations:

- Chapter leaders must be members of the Texas Exes.
 - 4 required officers – current president, president-elect, treasurer, membership chair
- Chapters must submit an annual financial status report and charter agreement.
- Chapters should utilize Texas Exes resources for communications with alumni – both paper and email.
- Chapters should use their own Federal Identification Number to obtain own bank account – can obtain online (<https://sa2.www4.irs.gov/modiein/individual/index.jsp>)
- Chapters will uphold Texas Exes bylaws and chapter's bylaws.
- Chapters should have Texas Exes manage all scholarship funds

Non-profit status:

- The Texas Exes is classified as a 501(c)(3) corporation by the IRS.
 - As a component of the organization, the chapter must also comply with the rules and laws that apply.
 - Principally, by not participating in support of political or religious activities and what the IRS calls “active marketing” for a for-profit concern

Chapter/Network Events and Activities

Texas Exes Chapters and Networks around the world have put on events ranging from formal seated dinners to game watching parties, from fun runs and fishing tournaments to community service activities. Any activity that gathers UT alumni for the purposes of connecting with one another, promoting higher education, raising money for scholarships, or just having some fun makes a good event for your chapter or network. Alumni have varied interests, so it is important to have a calendar with a variety of events to attract a wide range of alumni. Those alumni not interested in attending a monthly happy hour might be interested in attending a speaker event.

Page 25 in the Reference Section contains a summary of hints and tips for putting on events and a list of events that Texas Exes Chapters have successfully produced. More information can be obtained from your Chapter Advisory Board representative listed on page 59 of the Reference Section.

Texas Exes Scholarship Program

Texas Exes Chapter Scholarships benefit entering freshmen, transfer students, and/or students continuing their education at UT. These students are selected by Texas Exes members who volunteer with their local chartered chapter. The Texas Exes Chapters' volunteer leaders also work year-round to raise the funding for their awards.

Chapter scholarship overview:

- May 15th is the final deadline for Texas Exes Chapter leaders to submit the Scholarship Report Form, applications of recommended recipients, and any funds needed to make the Chapter's awards.
 - If the Chapter has an endowed scholarship managed by the Texas Exes, please check to see if there are available funds that can be used. A report listing this information will be sent to the president and scholarship chair, if one is listed, in February of each year.

- The current Texas Exes Chapter Scholarship Application must be submitted for each student. The application can be found online, or you can email Kristy Kimball at kimball@alumni.utexas.edu to request one sent via email.
 - ***Any chapter using a Texas Exes Chapter Scholarship Application other than the current application will lose the \$500 scholarship funding from the Texas Exes.***
- The current Scholarship Report Form listing the names of the recipient(s) and scholarship amount.
 - ***Any chapter that does not submit a Scholarship Report Form or submits an outdated Scholarship Report Form will lose the \$500 scholarship funding from the Texas Exes.***
- A scholarship award should not be less than \$500.
 - Smaller awards or supplemental awards can be made in the form of a Camp Texas registration fee or the Texas Exes Student Chapter membership fee.
- The Texas Exes will provide \$500 to each chartered chapter to use towards scholarships for students new to UT (that is, to an entering freshman or a new transfer student).
- All Texas Exes Chapter scholarship funds are to be managed by the Texas Exes, under the leadership of the Association's Investments Committee.
- Chapter scholarship donations via secure credit card processing are set up online; each chapter's site hosted by the Texas Exes features a tool so that chapter supporters may make an online donation.
- Donation checks should be made out to Texas Exes Scholarship Foundation and mailed to:

Texas Exes Scholarship Foundation
Attn: Kristy Kimball
P.O. Box 7278
Austin, TX 78713

More detailed information on Scholarships award process, Scholarship Endowments and Scholarship Fundraising is available on page 32 in the Reference Section.

Communications And Publicity

The Association provides a variety of ways to help Chapters and Networks spread the word to alumni about their activities:

Chapter Website

Each Chapter and Network is encouraged to have its own website. The Texas Exes can host a website for the chapter or network; maintenance of the site is up to the Chapter or Network.

Emails

Texas Exes will send out emails to all alumni in your area. This is an efficient, cost-effective way to share information about the Chapter/Network to your constituents. Chapter emails are sent out on Tuesdays, Wednesdays, and Thursdays of each week.

Paper mailings

Each chapter gets two, two-color paper mailings per year – one to members only and one to members and non-members in the area. These are either postcards or tri-folded invitations. Any specific paper requests will be at the chapters' expense. Networks can send out paper mailings, but they will incur the costs associated with the mailing.

Public Relations

Getting coverage in the local news helps both the local Chapter/Network, as well as Texas Exes. Having local coverage of your event reaches potential new members in your area, raises awareness of your group, the Association and UT, and highlights the benefits of membership in the local group and in Texas Exes. There is a full time staff member dedicated to public relations for the Texas Exes, and she can help the chapter identify local media and write press releases.

More detailed information on each of these items is available on Page 19 in the Reference Section.

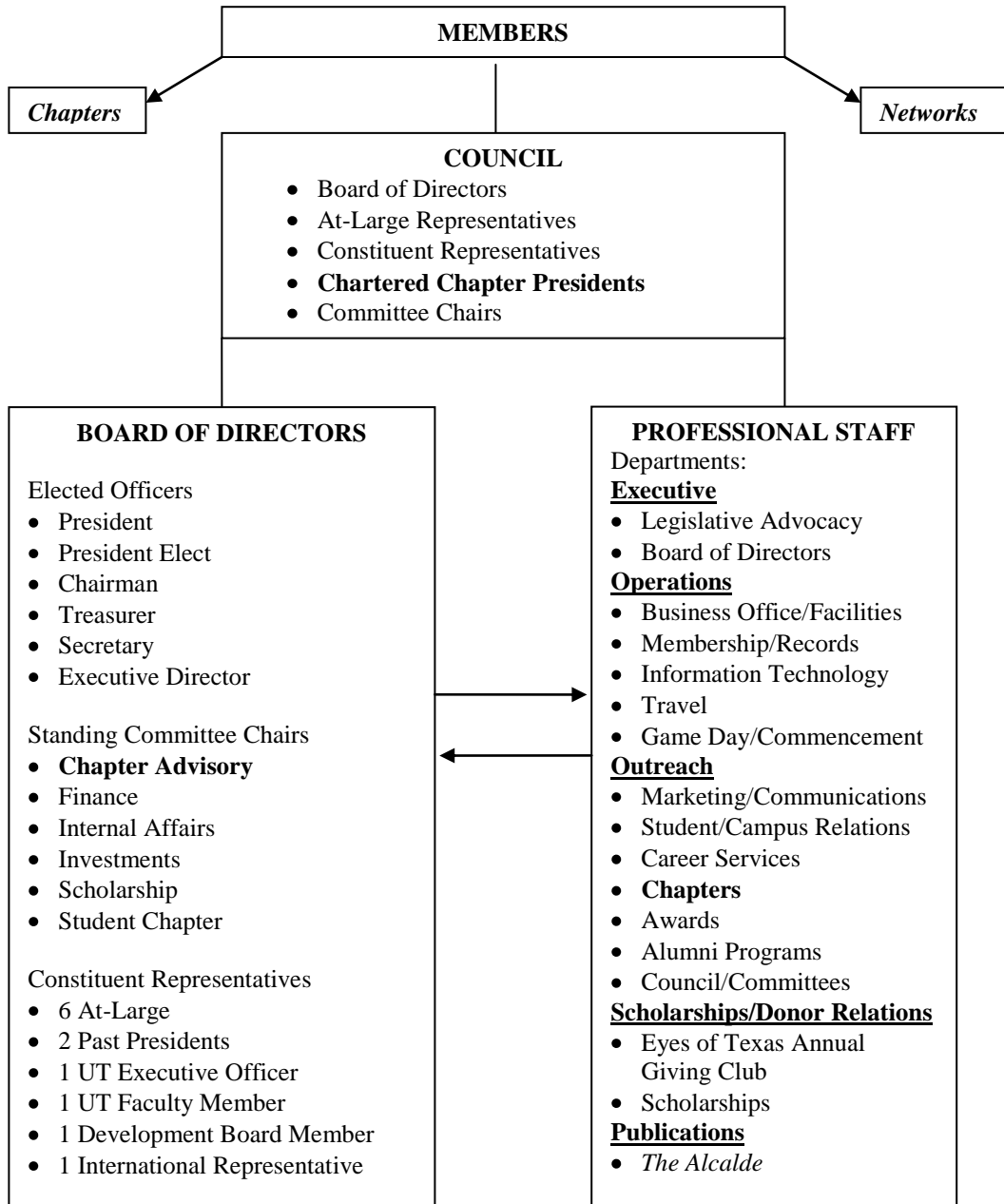


REFERENCE SECTION



TEXAS EXES STRUCTURE

The Ex-Students' Association (Texas Exes) is supported by over 70,000 dues-paying Annual, Associate Life, and Life **MEMBERS**. **COUNCIL** members are elected by the membership or appointed by the Association's president. The Council approves the budget and elects the Board of Directors. The **BOARD OF DIRECTORS** is in charge of the Texas Exes' daily affairs, funds, and property. **VOLUNTEER LEADERS** work with the 38-member professional **STAFF** to set and achieve goals for the organization.





MEMBERSHIP

Pricing Overview

Membership in the Texas Exes is a charitable contribution that protects the value of your diploma, shows your pride in the University, and keeps you connected to campus news and fellow alumni through social events and business networking – and through the award-winning *The Alcalde* magazine.

80% of your membership dues are tax deductible.

While the Texas Exes appreciate all of their members, Life Membership is the preferred membership level. A percentage of each Life Membership is invested into the Life Membership Fund, and it is this fund that covers the bulk of the operating expenses, including funding for the Chapters Department.

Membership levels:

Annual Dues:

- | | |
|--|------------------------------|
| ▪ *Individual - \$50 | *Joint - \$60 |
| ▪ Recent Graduate (up to 5 years past graduation) - \$25 | Recent Graduate Joint - \$30 |
| ▪ Parent of UT Student - \$25 | Joint - \$30 |
| ▪ UT Faculty/Staff - \$25 | |

Multi Year Dues:

- | | |
|----------------------------------|----------------|
| ▪ *Three-year Individual - \$130 | *Joint - \$150 |
|----------------------------------|----------------|

Life Membership:

- | | |
|---|------------------|
| ▪ *Individual - \$750 | *Joint - \$1,000 |
| ▪ *Associate Life Membership - \$50 down and \$25 installments every month, with no financing costs | |

Student Membership:

- Texas Exes Student Chapter - \$20 annually

**20% discount offered to Senior Citizens*

Membership Benefits & Services

(This list is constantly being updated, so for the most up-to-date information regarding member benefits and services, visit www.TexasExes.org/join)

- Online Alumni Directory
- Lifetime Permanent Forwarding Email Address
- Update Your Address Online
- Texas Orange Pages
- Bevo Move Center (online moving and home-related services)
- The Hook Up (member eNewsletter)
- *The Alcalde* Magazine
- Texas Exes Tailgate at the Alumni Center
- Away Game Tailgates
- Group Travel (Flying Longhorns program)
- Discounts on UT Continuing Education Classes
- UT Library Use
- Discounts on Performing Arts Center Performances
- Access to UT Recreational Sports Program
- Texas Monthly Discounted Subscription
- Horns Illustrated Discounted Subscription
- Short-Term Medical Insurance
- Liberty Mutual Homeowners, Auto, and Renters Insurance Discounts
- Alumni Career Services
- Bank of America Longhorn Mastercard
- Personal Wines
- Online Access to UT Libraries
- Austin Business Journal Discounted Subscription
- Initiation fee waved at the University of Texas Club
- Members qualify for University Federal Credit Union Services
- Discounted Princeton Review Courses
- Hyatt Hotels and Resort Savings

Membership Talking Points

Tailor your membership talk to suit your audience:

Sports Event – ex: Game Watching Party

Texas Exes is a membership-based organization that supports The University of Texas. We offer Texas Exes members benefits for every Longhorn fan – everything from buses to the OU game to travel packages to the major bowl games to away game tailgate parties. In 2010, over 1,000 members traveled with us to the BCS National Championship Game and got exclusive access to parties and events surrounding the game. We are the group to travel with to the next big game. When you are in Austin, the Alumni Center is the place to be before the home football games and it is an exclusive benefit for Texas Exes members. Locally, join us for game watching parties (ADD BENEFITS SPECIFIC TO THE LOCAL CHAPTER).

Networking Event – ex: Texas Exes Business Network Function

Texas Exes is a membership-based organization that supports The University of Texas. Texas Exes has the only Career Services office on campus that offers career support for all alumni of UT. Career Services provide members with resources, tools, and services in directing their ongoing career growth and development. Many local Chapters offer Texas Exes Business Network events. (ADD BENEFITS SPECIFIC TO THE LOCAL CHAPTER)

Social Event – ex: Thirsty Thursday

Texas Exes is a membership-based organization that supports The University of Texas. No matter where you are in the world, there are Texas Exes. Local chapters help bring a little of the Forty Acres to you, no matter how far from Austin you might be! The great events provided by the Chapter for local alumni wouldn't be possible without the membership dues. (ADD BENEFITS SPECIFIC TO THE LOCAL CHAPTER)

Scholarship Event

Texas Exes is a membership-based organization that supports The University of Texas. One of the most important things we do is provide scholarships to UT students. In the 2009-10 school year, \$2 million was given in scholarships. The scholarship program couldn't continue to exist without the support of dues-paying members. (ADD BENEFITS SPECIFIC TO THE LOCAL CHAPTER)

Tips for reaching out to nonmembers

Increasing Texas Exes membership benefits local Chapters – membership provides funding for local chapter program and increased membership leads to new volunteers for the local Chapter and increased Chapter participation. If non-members feel a part of the local Chapter, they are more likely to join! Here are some tips for reaching out to non-members in your area and making them feel welcome at your events:

- Utilize your Chapter website to showcase your events – both upcoming and past events. Non-members have access to the Chapter websites, so this is a great tool for bragging about the success of a recent event and showing how much fun was had. Also, this is a great tool for showcasing upcoming events – if they don't know it is happening, then they don't know to attend!

- Ask non-members to sign in at events with their address information. While Texas Exes maintains data for both members and non-members, it is more difficult to get current information for non-members. If we don't know where they are, then we can't communicate with them! Have them fill out their email address, at the least, and then send that information to Texas Exes so we can update our database. This way they will be on the email distribution for the next Chapter event!
- Follow up with non-members after an event. This can be done through an email telling them how happy you are they attended and informing them of the next chapter event. Include a link to the chapter website so that they can stay current on Chapter events and a link to Texas Exes so that they can join.
- Always have membership brochures on display. Be prepared to answer membership questions.
 - See the membership benefits section and the membership FAQ section
- When you make announcements at your events, be sure to plug membership. Tailor this to suit the type of event and to suit your local Chapter. You know best what is going to motivate non-members in your area to join.
 - See the membership talking points section for some ideas on selling membership
- Have a discounted price for members when possible. When this is not possible, incorporate another way to recognize members. Some ideas:
 - Have a drawing that only members can enter. This does not need to be something elaborate – a t-shirt would be enough.

The idea is to reward membership, not to alienate non-members. We want to show non-members the value in joining without making them feel left out.

- Chapters are covered under the Texas Exes liability insurance. If you need proof of insurance for an event, please request it from Courtney Ratliff.
- All presidents of chartered Texas Exes Chapters are automatically members of the Texas Exes Council and also serve on the Texas Exes Chapter Leadership Committee.

Network Resources from Austin

- Weekly email broadcasts can be sent to all alumni in your Network's area – both members and non-members.
- The Texas Exes will process the Network's credit card purchases, less processing fees. The resulting funds will be sent to the Network's representative to help with local expenses.
- On-line event registration is available. This tool will process credit card charges for ticket purchases and generate participant rosters. Again, the resulting funds will be sent to the Network's representative to help with local expenses.
- At-the-door, on-line credit card processing for event tickets, plus auction item and merchandise sales is available at Chapter events. To use this, a Network volunteer must provide a laptop with internet capability, and the venue will need wireless internet access or a phone line to use for this purpose.
- A website will be hosted for every interested Network (www.TexasExes.org/networkname). Please contact Courtney Ratliff if your network needs to develop a site. The Network's designated webmaster will be able to make edits.
- A listing as a Texas Exes Network with a link to the Network's website and contacts will be published on the TexasExes.org website.
- The Texas Exes logo can be used with prior approval.
- Networks are covered under the Texas Exes liability insurance. If you need proof of insurance for an event, please request it from Courtney Ratliff.

Chapter Advisory Board

The Chapter Advisory Board is made up of current and former Chapter leaders that maintain an active role with the Texas Exes and who draw from their own leadership experience to assist and guide other Chapter leaders. Each Chapter Advisory Board member is assigned a grouping of chapters to work with and serves as another resource available to Chapter leaders. Additionally, several Chapter Advisory Board members have been designated as having an area of specialty that may be called upon by all Chapters as needed; for example, sponsorships and issues affecting out-of-state Chapters. Chapter Advisory Board members are resources available to answer your questions and to share their knowledge so that Chapter leaders can benefit from our shared community of experience.

Chapter Advisory Board Members:

Tom Brayshaw – Fredericksburg, TX
 Mike Carrizales – Chair-Corpus Christi, TX
 Nate Carty – New York, NY
 Jeff Duchin – Dallas, TX
 Troy Glander – San Antonio, TX
 Steve Gragg – Phoenix, AZ
 Richard Heller – Austin, TX
 Kenneth Lewis – Houston, TX
 Kenny Liao – San Francisco, CA
 Mike Perez – Missouri City, TX

A list of Chapter Advisory Board members and their Chapter assignments is located on Page 59 in the Appendix.

Communication

Chapter/Network Information on Communication/Web/Logos

- Paper Mailings
 - Each chapter receives two free mailings per year – one to members only and one to members and non-members.
 - 2-color only, postcards or tri-folded mailers
 - Any specific paper requests will be incurred at the Chapters' expense.
 - All paper mailings will include the Chapter's logo.
 - Requesting paper mailings:
 - The content for the paper mailings should be emailed to Courtney Ratliff.
 - It takes 3 to 5 business days for the mailing to hit the mail from the time it is sent to the printer. Please allow an additional 3 business days for the designing and proofing of the invitation.
 - The request should specify if you want the mailing to go to members only or members and non-members.
 - A proof will be emailed to you to check before it is sent to the printer.
 - Invitations need to hit local mailboxes at a minimum of 3 weeks prior to the event. If the invitation is not requested in enough time for this to happen, then the Association reserves the right to deny the invitation request.
- Email Communications
 - Texas Exes will send out emails for each Chapter and Network.
 - Emails per Chapter/Network will be limited to one per week.
 - Chapter emails go out on Tuesdays, Wednesdays and Thursdays.
 - Emails go to all alumni in the area – both members and non-members.
 - Emails can be targeted to specific groups.
 - Example: An email can be sent to alumni in the area that graduated in a certain year range.
 - Requesting emails:
 - The email content should be emailed to Courtney Ratliff.
 - A proof will be sent to you before the email is sent.
 - Please allow 2 business days for an email to be sent.
 - Chapter emails are sent out on Tuesdays, Wednesdays, and Thursdays only.
- Chapter Listservs
 - The Association requests that Chapters/Networks use Texas Exes resources for all email announcements for official Chapter/Network events.
 - The database of official emails maintained by Texas Exes will be the most up-to-date.
- Website Hosting

- A Chapter/Network website is one of the best ways to communicate with alumni in your area.
 - Tip: It is very important to keep your website as up-to-date as possible.
- The Texas Exes will host a Chapter/Network website for all interested Chapters/Networks at www.TexasExes.org.
 - The Chapter/Network will be responsible for maintaining all updates.
- Logo Usage Guidelines
 - As an affiliate of the Texas Exes, Chapters and Networks are allowed and encouraged to use the Texas Exes brand. You may also use the Longhorn silhouette logo.
 - There can be no changes to the Longhorn silhouette logo.
 - For example: The color cannot be changed or words written over the logo.
 - See the policy on the use of trademarked images online at <http://www.texasexes.org/userdocs/policyregardingtheuseofthesilhouettelonghorn.pdf>.
 - Texas Exes will provide a Chapter/Network logo for the group to use.
 - Example



Publicity

The Association provides a variety of ways to help Chapters and Networks spread the word to alumni about their activities:

Chapter Website

Each Chapter and Network is encouraged to have its own website. The Texas Exes can host your website; maintenance of the site is up to the Chapter or Network. The more the site is developed and updated, the more interesting it will be to alumni in the area. Use your website as a tool to promote the group as a whole and your upcoming events.

Key elements to include in your website:

- Board/leadership contact information
- The mission of the Chapter/Network
- Current event information
- Summaries of recent events
- Event calendar
- Photos of past events
- Link to TexasExes.org and information about membership and benefits
- Scholarship information
- Involvement opportunities within the Chapter/Network

Emails

Texas Exes will send out emails to all alumni in your area, both members and non-members. This is an efficient, cost-effective way to share information about the Chapter/Network to your constituents. Make sure to send the email out in a timely manner and include all pertinent information, including who to contact with RSVPs and questions. It is important not to flood the email boxes of your alumni, so put thought into how often emails are being sent. Emails are best for regular announcements, reminders and updates.

Email tips:

- Chapter and Network emails are sent out on Tuesday, Wednesday, and Thursday of each week.
- Send the complete content to Courtney Ratliff.
- If more than one person is contributing to the email, have everyone proof it and give their okay *before* you send it back to Courtney. Only one person in the Chapter/Network will be sent the proof. Keep in mind that having more than one person look at the proof can delay the process.
- If you want a reminder email sent out, tell Courtney the day you want the reminder sent.
- Send the email content to Courtney at least 2 business days before you want the email sent.
- Create an enticing subject line that compels the reader to open the message.
- If the email contains several items, separate them into clear headings.
- Emails can include hyperlinks to a sponsor's website but not the sponsor's logo.
- If you want an image included in the email, send it as a separate jpeg attachment.

Paper Mailings

Each Chapter gets two, 2-color paper mailings per year – one to members only and one to members and non-members in the area. Networks can send out paper mailings, but they will incur the costs associated with the mailing. Texas Exes has negotiated a very good rate with a local printer, so we would encourage you to still go through us for any mailings, and we will then bill the Chapter/Network. These mailings are sent first-class and are limited to a 2-color postcard or tri-fold flier. Paper mailings are best for big events; make sure to mail them out in plenty of time. They must be received in mail boxes three weeks prior to the event.

Paper mailing tips:

- Send the complete content to Courtney Ratliff.
- A proof will be emailed to the person requesting the mailing.
- It takes 3 to 5 business days for the mailing to hit mail boxes from the time it is sent to the printer. Please allow an additional 3 business days for the designing and proofing of the invitation.
- When submitting a request, indicate whether the mailing is to go to members only or members and non-members.
- Remember that less is more. Provide information as simply, clearly and as concise as possible. Too much information will lose the readers' attention.
- Make sure to include all pertinent information on the mailing: date, location, time, directions, contact person, etc.
- When appropriate, use bullets and headings. These get your message across more quickly and effectively than paragraphs of text.
- Send out mailings with plenty of time before an event. The ideal lead time is 4 to 6 weeks notice.

Public Relations

Getting coverage in the local news helps both the local Chapter/Network, as well as Texas Exes. Having local coverage of your event reaches potential new members in your area, raises awareness of your group, the Association and UT, and highlights the benefits of membership in the local group and in Texas Exes. This is achieved through the public relations efforts at the local level. The goal of good PR is to connect with the community by building positive relationships and promoting a two-way communication. We would encourage all Chapters to appoint a Communications Chair.

How to get your chapter in the news:

- Look for a "hook" or a unique angle in a story. Reporters want to write stories about things that are one-of-a-kind or out-of-the-ordinary.
- Don't flood a reporter with reams of paper each week. Send items that are timely, interesting and newsworthy to the general public.
- Plan ahead. Send your news release to the media one to two weeks prior to your event.
- Telephone the day before the event as a gentle reminder. Ask for the assignment editor. Don't ask them to commit (they cannot), but just say you called to remind them and if they can cover your event, then you would be most appreciative.
- Respect a reporter's deadline. If he needs it by Monday, get it to him by Monday.
- Make sure your news releases are brief and concise – say what needs to be said, usually in two to five paragraphs.
- Double-check your facts. It does no good if the media comes to your event on the wrong day or at the wrong time.
- Always be honest with a reporter. Lost credibility cannot be regained.
- Remember that every good reporter wants to get a story before the competition. To show that you're being fair with the timing of your news releases, distribute to all at the same time. Document when the releases were distributed.
- Tell a reporter when you believe he or she has done a good job on a story. Write a thank you note for coverage you received. Copy your letter to the general manager or the publisher.
- If your event is not "covered," attempt to gain post-event coverage. Modify your original release to summarize the activity. Again, specify who, what, when, where and why. Photos with captions and quotes by those involved help make the release interesting and increase its chance of being published. If you send 35mm photos, identify the Chapter, date, student/teacher names and grades on the back of the pictures in case they are separated from the release. Use either a post-it note or a marker made especially for photographs. Sometimes the photo will be published but the release will not, so be sure that the caption can "stand alone."

- Recognition can be displayed on tables at the event and the event program, if appropriate.
- Sponsors can receive complimentary tickets to event(s), if appropriate.

What to avoid:

- Sponsor logos will not be on the email broadcasts (name listing only).
- Anything that could jeopardize the Texas Exes non-profit status. If you have a question, contact Courtney Ratliff at ratliff@alumni.utexas.edu, and she will get an answer for you.

- Please contact Texas Exes to have nametags mailed to you.
 - Banners
 - Groups can order banners through the Texas Exes.
 - A banner request should be sent to the Chapters Department.
 - The Chapter/Network is responsible for the cost.
 - A standard 2 x 6 banner runs approximately \$60.
 - Event decorations
 - Event decorations can be purchased at the Coop at a 40 % discount.
 - Contact:
Kris Salazar
ksalaza@universitycoop.com
512/476-7211 of 800/255-1896
- Auction Items
 - All autographed items must be purchased through Longhorn Ltd – the official team store or the University Coop (please note that these purchases are not eligible for the 40% discount)
 - Items available through the Texas Exes:
 - Flag flown over the Texas Capitol - \$16
 - Career Training Session - \$50
 - This is an hour long session with the Director of Career Services that can be done over the phone and tailored to the individual's needs.
 - Other suggestions
 - Personal Wines – personalize the label for your event
 - Solicit local donors
 - Dinner at a local restaurant
 - Weekend stays at a resort
 - Services such as car wash, house cleaning, dental cleaning, etc.
- Speakers
 - If you have more than one event a year with a speaker, then secure a variety of speakers to meet everyone's interest.
 - Ask the speaker early and have a few dates in mind.
 - If the speaker has to travel, the Chapter should be prepared to cover their travel expenses.
 - Take advantage of faculty and personnel who may be traveling to your area for development purposes or to attend a conference.
 - All requests for coaches to speak must go through the Athletics Department.
 - http://www.texassports.com/index.php?s=&change_well_id=2&url_article_id=2265#2
 - You will need to fill out the form and return to the Athletics Department.
 - In 2008, the Athletics Department instituted a new policy regarding football coaches. *Football coaches are no longer available as speakers for events.*
 - Contact Courtney Ratliff to view the Texas Exes Speakers Bureau for speakers/topics that may be available for your area.
- Suggestions for events – these won't necessarily fit for every Chapter/Network
 - Cultural Events
 - Host a monthly book club for your members
 - Example: Read books written by UT alumni – a new listing appears in each issue of the *The Alcalde*.

- If a UT author is in your area, then try to host a book signing party with him/her.
 - Tour local museums
 - Meet after the tour at a local restaurant to discuss the exhibit
 - Example: Organize a trip to the Houston Museum of Fine Arts for a current exhibit
 - Attend a local theater production
 - Meet before or after the production for dinner or drinks
 - Host a wine tasting or a winery tour
 - Can be done in someone's home or at a winery or restaurant
 - Great success amongst several Chapters
 - Can also be a brewery tour
- Volunteer Events
 - Participate in a Red Cross Blood Drive
 - Work with Habitat for Humanity
 - Some areas have competitions that pit schools against each other – this would be a great way to interact with other alumni chapters in the Big 12 Conference
 - Participate in a community clean-up day
 - Example: Get a group together to clean up the Guadalupe River – it is a good cause, and you are tubing!
 - Participate in a local walk or run to support charity
 - Get a group together to run/walk and raise money for a good cause
 - Example: The Alaska Chapter hosts a dinner and reception for the Texas4000 every year that is a big success.
 - Other Chapters along the route can host similar events depending on their needs.
- Family-oriented Events
 - Have a family picnic at a local park
 - For out of state Chapters, serve Texas BBQ or have a Texas-themed meal.
 - Host a family bowling night or skate night
 - Check your local library to see if they do regular summer readings/puppet or magic shows for kids and designate a Texas Exes day at the library.
- Social Events
 - Happy Hours with the alumni chapter of an upcoming sports opponent.
 - Schedule it the week of the game
 - Tailgate event to kickoff the football season
 - San Antonio Chapter does this annually to raise money for their scholarship fund.
 - Bring in “football experts” to talk to the crowd
 - Have a band end the event
 - If there is a professional team in your area, then buy a block of tickets and host Texas Exes night at the game.
 - Most non-major sports are happy to work with groups on getting tickets
 - Example: Minor league baseball, arena league football, major league soccer.
 - Meet before or after the game at a local bar or restaurant
 - Create a softball team or other athletic team made up of Chapter members

- Plan a bus trip to a game
 - Especially fun for out of state Chapters if the football, basketball or baseball team is playing nearby
 - The Kansas City Chapter did this for the Kansas State game
- If a Texas team is playing in your city, then put together an event around the game.
 - Out-of-state Chapters – host a tailgate or small reception, depending on the sport, before or after the game
 - Do this with less marquee sports as well as the big name sports – able to get a block of tickets and support a UT sport that doesn't get much recognition on the road
 - Example: If the Women's Soccer team is playing in your area, then arrange for a block of tickets and get your group together to attend the game.
 - To inquire about ordering a block of tickets, contact Marty Stokley at 512/471-8667 or marty.stokley@athletics.utexas.edu for Women's Tickets and Jason Nellis at 512/471-2323 or jason.nellis@athletics.utexas.edu for Men's Sports
- Host a pub crawl
 - Come up with a theme
 - Example: Beers around the world – visit local pubs
 - Arrange for bars to offer drink specials for your group
 - San Antonio Chapter does the “12 Bars of Christmas” – they sell wristbands for a nominal fee and in turn bars offer participants drink specials
- Happy Hours
 - If you are in a large city, then try to alter the location so everyone has a chance to attend.
 - Example: Host it one month in the north section of town, the next month in a central location, etc.
 - Do themed happy hours
 - Example: Martini night – go to a bar that has a large menu of martinis

Be sure to promote drinking responsibly at these events.

Raffle Policy

The following rules apply to Chapters within the state of Texas, as determined by Texas state law. Chapters outside of Texas will need to consult their state's rules governing raffles held by charitable organizations before proceeding with a raffle.

- A Chapter may not have more than two raffles in any given calendar year. The calendar year begins January 1st and ends December 31st, as defined by the State of Texas.
- A Chapter can only sell tickets to one raffle at a time. If the Chapter is offering two raffles, then they cannot sell the two tickets during the same time period.
- The Chapter must set a date in advance on when the prize will awarded. If the Chapter becomes unable to award the prize on that date, then they must set another date to award the prize within 30 days of the original date. If the Chapter fails to do so, then they must refund or offer to refund the amount paid by each person who purchased a raffle ticket.
- All proceeds from the sale of tickets for a raffle must be used for the charitable purposes of the organization.
- The following restrictions are in place for the promotion of the raffle and ticket sales:
 - The Chapter cannot, through the use of paid advertising, promote a raffle through a medium of mass communication, including television, radio or newspaper.
 - The Chapter cannot promote or advertise a raffle statewide.
 - The Chapter cannot sell or offer to sell raffle tickets statewide.
- The following information must be printed on each raffle ticket sold or offered for sale (this applies to raffle tickets sold in advance of an event):
 - The name of the Chapter conducting the raffle
 - The address of the Chapter or of a named officer of the Chapter
 - The ticket price
 - A general description of each prize having a value of more than \$100 to be awarded in the raffle
 - The date on which the raffle prize or prizes will be awarded
- A raffle prize may not be money.

This is only a snapshot of the rules governing raffles conducted by charitable organizations within the state of Texas. If you have specific questions, please contact Courtney Ratliff.

- Have nametags available and suggest they write their industry or occupation in addition to their name
- Encourage everyone to bring their business cards
- Host the event at an appropriate venue – choose a bar that lends itself to conversation and mingling
- **Insight Into Industries**
 - Host an event where 4 to 5 industries are represented – have alumni representatives from each industry attend to serve as industry reps
 - Industry reps are not required to speak or address the crowd – they are there to answer questions and talk to those specifically interested in their industry
 - The purpose of this event is threefold:
 - To connect alumni in the Chapter area with fellow alumni that represents their career field or industry of interest
 - To allow alumni to network with each other
 - To give alumni the inside track of how a particular industry works
 - For more information see the Insight Into Industries Proposal in the Appendix on page 59.
- **Networking Lunches or Breakfasts**
 - Advertise regularly scheduled lunches or breakfasts as a chance to network with other alumni
 - This can have a speaker or not – either way, it is an opportunity for alumni to interact with each other for the purpose of networking
 - Have attendees stand up to introduce themselves and give their elevator pitch
- **Speaker Series**
 - Bring in speakers throughout the year to address the group on timely topics
 - Make sure to vary the topics by event.
 - For example, have someone speak on finance one month and then someone speak on the arts the next month
 - A panel of speakers on a specific topic

Texas Exes Career Services

The Texas Exes offer the only full service Career Services Office to alumni. This is a great benefit to members and can be utilized no matter where you live. Jennifer Duncan is the Director of Career Services, and she can be reached via email at Duncan@alumni.utexas.edu and via phone at 512/232-1847. The following is just a sampling of the benefits offered through the Career Services Office. For a full listing, please see the website - <http://www.texasexes.org/career/index.aspx>.

- Hire ‘Em Horns – Texas Exes resume and job listing site; alumni may post jobs for free on behalf of their employer
- Teleclasses – monthly, topic-driving career classes
- Consultations – can be in person or via phone; can be individual or in a group setting
- Assessments
- Career Network – career network of 600+ alumni career contacts who have agreed to do information sessions
- Virtual Career Center – online job listings and resources



SCHOLARSHIPS

Chapter scholarship process:

- Distribute applications to all local high school and junior college counselors
- Make sure the Chapter's criteria, contact name, address, and phone numbers are included on applications
- Establish a selection committee (minimum of three individuals)
- Select recipients
- Contact Kristy Kimball (Kimball@alumni.utexas.edu) to confirm student eligibility
- Turn in Scholarship Report form, recipients' applications, and any funds needed to award the scholarships to the Texas Exes by May 15th
 - Remember to round down to the nearest dollar on money reported.
 - Ex: \$1234.05 would be used only as \$1234.00
- Notify all applicants
- Hold an event to honor recipients locally - or announce the Chapter's awards at the student's High School Honors Day event
- Announce the awards in local newspapers

Soliciting applicants:

- Maintain a good, working relationship with college counselors at the local high schools
 - Distribute applications to them
- Distribute applications to the local admissions office, if UT has an admission office in the area
 - UT Admission Offices in Austin, Dallas, Houston, San Antonio, the Valley, Lubbock and Longview
- Put information about the Chapter's scholarships and how to apply on your website
- Contact students who have been accepted to UT

Selection process:

- Chapters have autonomy in selecting scholarship recipients (subject to final approval from the Scholarship Committee of the Texas Exes Scholarship Foundation).
- A list of admitted students from specific areas is available through the Texas Exes.
- Financial need definitely should be considered. Annual UT costs for Texas residents are now approaching \$23,596.
- Scholarship awards will be approved only if made to students admitted and enrolled full time at UT Austin.
- Student-athletes are not eligible for a Texas Exes Scholarship Foundation Chapter Scholarship award.

Scholarship Endowments

Endowment Overview

- Endowments are managed by the Association's Investment Committee.
- General endowments require a minimum of \$7,500 for Texas Exes Chapters. The Chapter can begin depositing with a smaller amount to save toward any endowment.
- The current policy is for an endowed fund's market value to be averaged as of the end of the calendar year over the previous 12 quarters, 4.5% of that average disbursed as scholarships for the next academic year, with a small percentage from each fund also paid for administrative fees. A fund must be in investment for a full calendar year before disbursement can begin.
- A review of the Chapter's endowment and available funds will be sent to the Chapter president and the scholarship chair, if listed, every February.
- Funds for Chapter scholarships must be managed by the Association rather than held locally and invested in order to protect Chapter volunteers, as well as the fund.

Steps for endowing a Chapter Scholarship

- Chapters must complete a Chapter Endowment Agreement and have it signed and on file with the Association.
 - Chapters can fill out the background information on the endowment and the eligibility requirements.
 - Eligibility requirements can be changed within reason; this will require signing a new endowment agreement to keep on file at the Association.
 - Chapter endowments can be named in someone's honor.
- The Chapter Endowment Agreement should indicate that money is to be placed in an endowment.

Benefits of endowing a Chapter Scholarship

- It relieves the pressure of annual fund-raising for the Chapter. Endowments allow for scholarships to be offered continually in perpetuity from investment earnings.
- Scholarship endowments allow for scholarships to be offered every year, even without adding money to the fund, and even if the Chapter disbands. (The Association's Scholarship Committee can make the selection in order to make the award to students from the Chapter's community/ies.)
- An endowment is great way to honor someone from the local Chapter for their continued efforts in the Chapter.

Scholarship Fundraising

Helpful tips (beyond auctions and raffles!)

- Publicize your scholarship fund on your website and on your email broadcasts. Let your alumni know that they can contribute year round. This also touches people who don't actively participate in Chapter events.
- On your website, consider profiling your most current scholarship winners. This adds a human interest element and personalizes the scholarship fund.
- Make sure that donors know they can participate through the employers matching gift program.

- Add an extra few dollars to the cost of attending an event with proceeds going to the scholarship fund.
- Have a wine and cheese tasting, for example, with proceeds going to the scholarship fund. If vendors see this as an opportunity to educate a new audience about their products, then they may be willing to work with a Chapter on such an event.
- At game watches, collect a dollar or two from anyone who wants to participate each quarter of the game. Those that contribute are entered into a drawing at the end of each quarter. All proceeds go to the scholarship fund. Prizes are small items – t-shirts, hats, etc., that can either be purchased cheaply by the Chapter or items they get donated.
- Hold a “silent” meal auction in which members of the Chapter donate menus that they would prepare. Menus are auctioned off to the highest bidder, and the cooks are not revealed until the menu is sold. This leaves suspense as to who will be cooking for whom. The date of the meal is then arranged by the host and the winner. This is also a great way for members to get to know each other.

Note about raffles: Chapters can only have two raffles per year but can have an unlimited number of door prizes.

Endowed Scholarship Program Overview

- To establish an endowed scholarship administered by the Texas Exes Scholarship Foundation, a minimum gift of \$30,000 for groups or individuals is required for named scholarships with general selection criteria. If the donor(s) wish to designate a named award with specific selection criteria, then a minimum of \$50,000 is required for an endowment. Endowments must be funded in five years or less. The overall scholarship program is monitored by the Scholarship Committee of the Texas Exes Scholarship Foundation. The minimum gift for Texas Exes Chapter Scholarships is \$7,500, regardless of specific or general selection criteria.
- The Texas Exes Scholarship Foundation has approximately \$61 million under management in a diversified investment portfolio. Management of the endowment funds is through an investment agreement with the Texas Exes and executed through the Texas Exes Investment Committee. The Investment Committee consists of approximately 12 persons, carefully chosen based on their education and business experience. Several are professional money managers in their own careers. The committee is assisted by professional investment consultants, and is guided by a written investment policy statement. Portfolio security management, that is, decisions regarding the actual composition and mix of securities – the what, when, and how much of buying and selling securities – is performed by professional fund managers. The Investment Committee meets four times each year at a minimum, more when situations dictate such.
- Each fund is accounted for separately but is pooled for investment purposes and will reflect market gains or losses on investments or additional principal contributions. The level of distribution from all scholarship endowments is determined annually by the Texas Exes Scholarship Foundation Board of Directors, based upon the recommendation of the Investment Committee. The level of distribution is expressed as a percentage of the average balance of the fund over the trailing 12 calendar quarters. Therefore, the distribution may be entirely from earnings or a combination of earnings and corpus, depending on the investment returns generated by the fund and on the distribution percentage determined by

the Board of Directors. The same distribution percentage is applied to all scholarship endowments. The decisions of the Investment Committee and of the Board of Directors are guided by the concept of perpetual endowment. Most recently the distribution percentage was set at 4.5 percent (net of fees) of the 12 quarter average. Investment performance has traditionally been higher than industry benchmarks.

- The Investment Committee negotiates administrative and investment fees, which are paid to the money managers, the investment consulting firm and the Texas Exes for their services. The fees, which are based on the market value of the fund, are taken from the fund each year.
- Disbursements will be made only within written guidelines provided by the donor and approved by the Texas Exes Scholarship Foundation Board of Directors. Contributions may be added at any time. Corporate matching gifts are welcomed. Checks and matching gift forms should be made out to The University of Texas but designated for a particular fund and then mailed to the Texas Exes. The first distribution can be made only after the funds have been invested for at least a full year.
- The Ex-Students' Association of The University of Texas (Texas Exes) and the Texas Exes Scholarship Foundation are both classified under the Internal Revenue Code as a 501 (c)(3) organizations, so your scholarship donations are tax deductible.
- All Texas Exes Scholarship Foundation scholarship recipients receive special recognition. They are welcomed to the campus in the fall and their scholarship checks are presented at special and appropriate occasions during the year.



CHAPTER CHARTER REQUIREMENTS

Charter Renewal

Chapter charters must be renewed every year. The chapter year runs from July 1st to June 30th. ***All forms must be completed and returned by June 1st.*** Chartered Chapters are approved at the Texas Exes Board of Directors meeting in July.

Documents needed:

- Charter Agreement
 - This form allows the group to apply to the Texas Exes' Board of Directors for a charter.
- Officer Report
 - A minimum of four individuals in the required positions must maintain current Texas Exes membership.
 - Required positions – current president, president-elect, treasurer, and membership chair
 - In order to diversity fiduciary responsibilities, the treasurer and president cannot be the same person.
- Financial Statement
 - This lists income sources and expense categories for the previous year; the local balance held indicates operations funding for the group and scholarship awards to be made in the upcoming academic year.
- Chapter Bylaws
 - These must be signed by 10 current Texas Exes members. This remains on file and is resubmitted only when amendments have been made, but all groups to be chartered need to use this document as a starting point; it establishes the "leadership year" as July 1 - June 30.

All forms can be found online at <http://www.texasexes.org/chapters/chartering.aspx>.



IDEAS FOR LEADERSHIP

Volunteers and Leadership Succession

Chapters and Networks rely on volunteers. A successful Chapter and Network needs a network of volunteers it can rely on to stay active. Keeping new volunteers active in the Chapter/Networks keeps the group current and energized and allows for the work to be divided among the volunteers.

If you are not constantly recruiting new volunteers, then there will not be a future leader to step up and lead the Chapter/Network into the future. Involving new members in the planning and implementation of a Chapter/Network activity encourages and prepares them to later assume leadership of the activity.

Volunteer Basics

Benefits of New Volunteers/Leaders:

- Re-energize the Chapter/Network and bring new ideas
- Help with the work
- Bring in other new volunteers
- Bring new connections to community resources – sponsors, speakers, etc.
- Keeps the Chapter/Network from getting stuck in a rut

Why People Volunteer:

- To give back
- To feel part of the solution and to influence the future
- To have fun
- To meet people that have shared their experiences
- To bring balance to their lives
- To expand social circles and to network
- To support an institution they feel passionately about
- To use and enhance their skills
- To feel useful and needed

Why Volunteers Stay Committed:

- They have a feeling of belonging, of being part of a team or family
- They feel that they are on “the inside” or have special access
- They see that their participation does make a difference
- They feel appreciated
- They see room for growth and advancement within the group
- They are capable of doing the tasks placed before them

Three Steps in the Volunteer Life Cycle

Recruiting Volunteers:

- Ask them directly and be specific in your ask
- Assume members are interested in volunteering – they just need the right fit; approach recruiting volunteers in a positive manner
- Make it easy to say yes and to get involved
- Advertise the need for volunteers through your email broadcasts and on your website and give them someone to contact
- Be specific about the needs of the Chapter/Network; be specific about both the needs and skills necessary
- Use current volunteers as recruiters – strong volunteers attract strong volunteers
- Host volunteer recruitment events throughout the year
- Always follow up with any potential volunteer and make sure to use them

Training Volunteers:

- Volunteers need training to set their expectations, to define their responsibility, and to have greater buy-in to the Chapter
- Have scheduled volunteer training meetings
- Consider a volunteer buddy system or assigning a volunteer chair
- Provide sound guidance and direction from someone who is experienced and well-informed

Retaining Volunteers:

- Integrate them into the Chapter culture through training and delegating
- Make them feel a part of the Chapter's success
- Make them feel needed and wanted by actually using them
- Delegate appropriate tasks to them – give them a suitable assignment by matching their skill sets with the needs of the Chapter; take their personal preferences into consideration
- Thank them – make sure volunteers know their efforts are appreciated.
- Respect their time and treat them well
- Make sure there is an avenue for their voice to be heard; make sure they feel free to make suggestions and respect their opinions

Importance of Delegating:

Basics of Delegating:

- Delegate means to empower, to entrust
- Delegating should not be seen as a burden but rather as a way to get further involved with the Chapter
- Volunteers must be given something specific to do
- Assignments must occur as a mutual selection

The 3 L's of Delegation

- Look for good people – pay attention at meetings and events for who is energetic and enthusiastic about the event and the Chapter.
- Listen to them – learn what people need from you before you try to delegate to them; you will learn what they like to do and what they want to do
- Let them shine – give them the credit they deserve

Tips for Leadership Succession:

- Start new volunteers in small roles, such as asking them to coordinate an event or an aspect of an event
- Have a succession structure outlined
- Think about who would make a good future officer and cultivate that relationship – should be constantly looking for new leaders, not just right before the June 1st deadline!
- Divide responsibilities up among a greater number of people

Financial Basics

- All Chapters and Networks are required to set up their own local bank accounts in the Chapter's/Network's name.
 - It cannot be an individual's bank account.
- All Chapters must submit their own Federal Identification Number.
- It is suggested that Chapters prepare a general budget for the year, along with a budget for each significant event.
- Operating funds vs. scholarship funds
 - Operating funds are used to keep the Chapter/Network in operation. This would include money for any additional mailings, meetings, deposits, and other expenses incurred.
 - Scholarship funds are those designated for student support. They should be sent to the Texas Exes Scholarship Foundation by May 15th to be awarded.
- Donations to the scholarship funds managed by the Texas Exes Scholarship Foundation are tax-deductible.
 - Checks for scholarships should be written to the Texas Exes Scholarship Foundation.
- The Texas Exes general liability insurance extends to Chapters. If you need proof of insurance, please contact the Association.

Chapter Leadership Job Descriptions

These are just a sample of the most common offices and their responsibilities. This list is not meant to be exhaustive, but rather a guideline.

Information for all positions:

- Association bylaws require that every Chapter leader (all members of a Chapter's Board, Advisory Board, or its committees) is a current dues-paying member of Texas Exes.
- Since each Chapter is unique – and since there are many successful forms of leadership structure – the following should be taken as guidelines.

President

- Determine the Chapter's objectives for the year and work toward long-term goals
- Supervise and coordinate the Chapter's activities, assuming responsibility for the overall success of the Chapter
- Call and preside over all Board or Chapter-wide meetings
 - Try to attend all of the Chapter's major committee or planning meetings and events
- Delegate duties to committee chairs and/or Board members
- Adhere to the bylaws of the Chapter and of Texas Exes

- Work closely with the president-elect to keep him/her informed of all aspects of the Chapter's activities
- Serve as the principal liaison with the Texas Exes, the University and other organizations as needed
- Encourage Board members to attend the Chapter Leadership Conference
- With the president-elect, oversee the formation of the nominating committee, who will choose the slate of officers to be voted on for the following year
- Work with the president-elect to make sure that all required charter documents are turned in by the June 1st deadline

President-Elect

- Assist the president in meeting the Chapter's goals
- Work on all Chapter projects to familiarize yourself with the Chapter you will be presiding over next year
- Act as the presiding officer in the absence of the president
- Responsible for sending in the officer list and signed charter agreement for your term to the Texas Exes Chapter Department by June 1st
- With the president, oversee the formation of the nominating committee, who will choose the slate of officers to be voted on for the following year

Treasurer

- Develop annual budget and keep records of all financial transactions of the Chapter
- Collect and distribute Chapter funds
- Keep all invoices, receipts, scholarship payment records, etc. on file for at least three years
- Work with event chairperson to keep track of event budget
- Keep the rest of the Board informed of the Chapter's financial status
- Submit a year-end report on the Chapter's financial status to the Chapter Director

Membership/ Involvement Chairperson

- Has their email listed as the email contact on the Texas Exes "move to" notifications
- Help to recruit and retain new members by developing programs or processes for pulling in new members and new volunteers
- Make sure to have membership brochures and Texas Exes branded nametags at every event
 - Can be easily ordered through the Association
- Follow up immediately on communication from people willing to help with Chapter activities.
- Ensure that every Chapter leader is a current member of the Texas Exes
- Promote the value of membership at events
 - Suggestions: through a member ticket price, a member-only door prize, etc.
- Ensure that address update forms are available at all events and meetings or direct them to the Texas Exes website
 - Share all updates with the Texas Exes

Secretary

- Keep current address information on officers/board members
 - Send changes to the Association
- Take minutes at Chapter and Board meetings and send copy to officers and leaders once approved
- Ask for up-date requests at every Board meeting
- Maintain the permanent record of all Chapter proceedings

Scholarship Chairperson

- Establish and oversee a Scholarship Committee to help distribute scholarship applications to local area high schools, to choose recipients and to notify award-winners
- Set criteria for selecting the Chapter's scholarship recipients and involve the entire committee in making the selections
- Submit Scholarship Report Form and recipients' application – and work with Chapter's Treasurer to include a check, if needed to make the awards, by May 15th (or the current deadline, as decided on by the Texas Exes Scholarship Foundation)
- Ensure that every high school has up-to-date information from the UT Freshman Admissions office
- Notify award-winners and applicants who will not receive awards
- Work with the Chapter to honor the recipients locally
- Consider holding a "Student Send-Off" for all students from the area attending UT

Texas Independence Day/Social Events Chairperson

- Organize the Chapter's social events for the Chapter year
 - Appoint and work with specific event chairs, when necessary
- Plan for promotion and publicity as early as possible
 - Work with the Communications Chair in publicizing the event
- Establish financial and operational objectives for the Chapter events
- Keep record of the events – vendors used, lessons learned, etc.

UT Advocates for Higher Education Chairperson

- Sign up as a member of the UT Advocates for Higher Education Network
- Ensure that all legislative advocacy on behalf of UT is issue-oriented and completely non-partisan
- Keep in touch with the Association's Public Policy Director so you are up to date on the important issues
- Encourage others in your Chapter to get involved as UT Advocates and sign up online - <http://www.texasexes.org/form/legislative.asp>
- Attend UT's Legislative Day at the Capitol and any other legislative events held by the Association if possible
 - Send another delegate from the Chapter's area if not possible
- Remind Chapter leaders to include an invitation to local legislators to appropriate Chapter events

Communications Chairperson (formerly the Marketing/PR Chair)

- Coordinate the communication and marketing strategies for the Chapter
- Work with the Social Events chair to ensure that Chapter events are promoted in a timely, effective manner
- Submit requests for broadcast emails or paper mailings to Texas Exes staff in a timely manner
- Contact local media to get coverage of events
- Consider setting up a Chapter website if not already in place and ensure that it is kept up-to-date
 - Work with the Chapter's committee chairpersons to maintain correct information
- Consider setting up Chapter presence on social media websites and help to maintain the information presented on these sites

Texas Exes Business Network (TEBN) Chairperson

- Coordinate the Chapter's TEBN events and other networking events
- Plan activities/speakers that appeal to your Chapter's community
- Coordinate TEBN events and activities to maximize compatibility with and mutual reinforcement of other Chapter activities

Exes for Texas Chairperson

- Maintain communication with Alumni Volunteer Coordinator in the Office of Admissions
- Keep Chapter updated on volunteer opportunities within the Exes for Texas program
- Educate yourself with materials provided by the Office of Admissions about the current UT admissions environment (changes very frequently)
- Develop a committee of interested alumni to help with Exes for Texas initiatives in the Chapter area as needed
- Coordinate Chapter volunteers for Exes for Texas programs, as needed

Webmaster

- Manage and update the content of the website
- Work with Board members and Committee chairs to keep content current



APPENDIX & FORMS

Helpful Websites

Texas Exes – www.TexasExes.org

The University of Texas – www.utexas.edu

Texas Athletics – www.TexasSports.com

Information on trademarks and licensing – <http://www.utexas.edu/visualguidelines/>

Fast Facts on UT – <http://www.utexas.edu/opa/pubs/facts/enrollment.php>

Freshmen Admissions – <http://www.utexas.edu/student/admissions/>

Coach appearances request –
http://www.texassports.com/index.php?s=&change_well_id=2&url_article_id=2265#2

Athletics Ticket Information –
http://www.texassports.com/index.php?s=&change_well_id=2&url_article_id=136

Sample Charter Agreement

**2011-12 CHARTER AGREEMENT
TEXAS EXES _____ CHAPTER**

The Ex-Students' Association (Texas Exes®), is a membership organization whose mission is to "connect our members to each other and to the past, present, and future of The University of Texas." This is accomplished in local communities through the volunteer-led efforts of Texas Exes Chapters. To be eligible for official designation and support and services, Chapters must annually submit this charter agreement, along with materials listed, to the Texas Exes Board of Directors. DEADLINE FOR SUBMITTING THE CHARTER AGREEMENT AND MATERIALS IS JUNE 1, 2011.

The Texas Exes Chapter named above hereby applies for charter approval and agrees to carry out the Texas Exes' mission in the following ways:

1. Be aligned with the Texas Exes' mission, including active promotion of Texas Exes membership and proper use of official Texas Exes branding in all communications.
2. Provide programming for diverse interests and age groups.
3. Use Association resources for communication with Texas Exes members and potential members who live in our Chapter's area; encourage alumni to keep their data current by updating their information on the Texas Exes website.
4. Start our officer/leadership year on July 1 to be consistent with the Texas Exes leadership year.
5. Obtain and use our own Federal Identification Number to identify our local bank account.
6. Adhere to the Texas Exes' bylaws, as well as Chapter bylaws.
7. In a timely manner, send all scholarship funds to the Association for management by the Investment Committee.
8. Attach with this charter agreement the following documents (available at <http://www.texasexes.org/chapters/chartering.aspx>):
 - o List of officers for the current charter year (required: at least president, president-elect, treasurer, membership chair – must be current Texas Exes members)
 - o Financial Status Report for the previous year
 - o Chapter bylaws (if not done so for the 2005-06 leadership year or if amendments)
9. By signing below, the Texas Exes pledges to assist the Chapter in its efforts to carry out the Texas Exes' mission in the ways set forth above.

As elected president of this Chapter, I agree to the statements above.

Printed name, 2011-12 President
Signature _____
Texas Exes _____ Chapter
Date _____

Charter Approved by Texas Exes Board of Directors
(date): _____

Executive Director, Texas Exes

Signed copy will be returned to Chapter president.

Sample Officer Report



CHAPTER OFFICER LISTING

FOR THE TEXAS EXES _____ CHAPTER

COVERING THE PERIOD OF JULY 1, 2008 - JUNE 30, 2009

2008-09 Chapter President, please read and sign:

I confirm that these persons are members of The Texas Exes, as required by Association Bylaws, and that the addresses below are correct to the best of my knowledge.

_____ President

NOTE: Texas Exes chapters vary in size and activity, so structure may vary. The following are suggested offices or committees. Only the positions marked with an "*" are required. Expectations of the four required positions are posted on line at www.TexasExes.org.

Please list all members of the Chapter's Board of Directors and of the Chapter's Advisory Board, as well as all committee chairs (make copies of last page if necessary.) The chapter should keep a copy and update this for the Association as changes occur.

* **President:** [Mr., Mrs., Ms., Dr.] _____
 Texas Exes ID (can be found on label of *The Alcalde*): _____ AND/OR
 Full Legal Name: _____
 Membership: ___ Annual ___ Life ___ Associate Life
 Mailing Address: _____
 City: _____ State: _____ Zip: _____
 Telephone: (work) _____ (home) _____
 FAX number(s): _____
 Preferred E-Mail Address: _____

* **President-Elect:** [Mr., Mrs., Ms., Dr.] _____
 Texas Exes ID (can be found on label of *The Alcalde*): _____ AND/OR
 Full Legal Name: _____
 Membership: ___ Annual ___ Life ___ Associate Life
 Mailing Address: _____
 City: _____ State: _____ Zip: _____
 Telephone: (work) _____ (home) _____
 FAX number(s): _____
 Preferred E-Mail Address: _____

* **Treasurer:** [Mr., Mrs., Ms., Dr.] _____
 Texas Exes ID (can be found on label of *The Alcalde*): _____ AND/OR
 Full Legal Name: _____
 Membership: ___ Annual ___ Life ___ Associate Life
 Mailing Address: _____
 City: _____ State: _____ Zip: _____
 Telephone: (work) _____ (home) _____
 FAX number(s): _____
 Preferred E-Mail Address: _____

* **Membership/ Involvement Chairperson:** [Mr., Mrs., Ms., Dr.] _____
 Texas Exes ID (can be found on label of *The Alcalde*): _____ AND/OR
 Full Legal Name: _____
 Membership: ___ Annual ___ Life ___ Associate Life
 Mailing Address: _____
 City: _____ State: _____ Zip: _____
 Telephone: (work) _____ (home) _____
 FAX number(s): _____
 Preferred E-Mail Address: _____

Secretary: [Mr., Mrs., Ms., Dr.] _____
 Texas Exes ID (can be found on label of *The Alcalde*): _____ AND/OR
 Full Legal Name: _____
 Membership: ___ Annual ___ Life ___ Associate Life
 Mailing Address: _____
 City: _____ State: _____ Zip: _____
 Telephone: (work) _____ (home) _____
 FAX number(s): _____
 Preferred E-Mail Address: _____

UT Advocates Chairperson: [Mr., Mrs., Ms., Dr.] _____
 Texas Exes ID (can be found on label of *The Alcalde*): _____ AND/OR
 Full Legal Name: _____
 Membership: ___ Annual ___ Life ___ Associate Life
 Mailing Address: _____
 City: _____ State: _____ Zip: _____
 Telephone: (work) _____ (home) _____
 FAX number(s): _____

Sample Financial Report



Annual Financial Status Report to Association Headquarters

For the period: _____, 2008 through _____, 2009 (due by June 1)
 Federal ID Number used to identify chapter's local bank account: _____
 Chapter Treasurer during reporting period: _____

ITEM	REVENUE	(EXPENSE)	NET
Scholarship Award(s)/Donations			
Operations income from autographed sports items			
High School Teaching Award reception			
UT Student Send-off			
Young Alumni events			
Texas Independence Day event			
Golf Tournament			
"Social-only" events			
Administrative expenses			
PR and chapter communications			
Membership/Invovement activities			
Merchandise sales			
Interest income on local funds			
Local newsletter subscriptions or similar income			
Other - include details in an attachment			

ENDING BALANCE: _____

Preparer, your signature below signifies accuracy of the numbers above.
 Printed name of person preparing this statement: _____
 Signature of person preparing this statement: _____

Sample Auction Donation Letter

CHAPTER LOGO

Company
Address 1
Address 2
City, State Zip

Dear Name:

The Texas Exes CHAPTER will be hosting EVENT on DATE to raise funds for our local scholarship fund. Proceeds from the event will go towards scholarships for students from the AREA that are attending The University of Texas at Austin. With the rising costs of education, it is more important than ever that we help our local students achieve their dreams of a college education!

We hope that you will join us in this endeavor by donating to our silent and live auctions. Some of the wonderful advantages of donating to such a great cause are:

- For first-time donors or companies new to AREA, it is an excellent marketing tool to promote your business and brand yourself.
- Every donor will be acknowledged LIST WAYS THEY WILL BE ACKNOWLEDGED.
- The Texas Exes CHAPTER encourages all Texas Exes to patronize donors' places of business.

The Texas Exes CHAPTER prides itself on providing scholarships for AREA high school students who will attend The University of Texas at Austin. Each year, we award over \$AMOUNT in scholarships from our endowed scholarship fund.

Thank you for your careful consideration of our request. We look forward to your participation and support. Please complete the enclosed Auction Donor Form and return in the enclosed envelope.

If you have any questions, please contact our TITLE, CONTACT NAME, at PHONE NUMBER or EMAIL ADDRESS.

Kindest regards,

NAME
TITLE
EMAIL ADDRESS

Enclosures

P.S. I have included a copy of the invitation that was sent out to area UT alumni.

Sample Auction Donation Form

Chapter Logo
Auction Donor Form

For additional information, contact CHAPTER LEADER at EMAIL ADDRESS or PHONE NUMBER.

Texas Exes CHAPTER Chapter * 501(c)(3) Non Profit Organization * Tax ID # 74-1109640

Donor Name: _____

Company Name: _____

Address: _____

City: _____ **State:** _____ **Zip:** _____

Phone: _____

Item Donated: _____

Market Value: \$ _____

Full item description (for program): _____

Time limit, restrictions, and special instructions (if applicable): _____

Please check one: Tangible Item Certificate/Tickets

Please check one: Item is attached with this form Item will be mailed to the chapter
 Item to be picked up by the chapter

Donor Signature: _____ **Date:** _____

Silent Auction Rules

TEXAS EXES _____ CHAPTER

The Texas Exes _____ Chapter’s Silent Auction will be held
_____ at the _____ from _____ to _____.

Bids for the Silent Auction are placed by writing your first and last name, bid amount and phone number on the first available line on the bid sheet corresponding to the item number.

Bidding begins with the stated minimum bid. Silent bids must increase previous bid by the stipulated minimum increase or the bid will be invalid. -Bids must be made by adults only.

The Silent Auction will close at _____. The Auction judge will be the sole authority on the auction.

Item winners will be contacted for payment and item pick-up immediately following the auction. Auction item payment can be made with a MasterCard, American Express, Visa, cash or check made payable to the Texas Exes _____ Chapter. Each item winner will receive a donation receipt for their contribution to the the Texas Exes _____ Chapter.

All payments are due in full by _____. The Auction judge reserves the right to sell unpaid items to the next highest bidder. All sales are final, and no refunds will be made under any circumstances.

Silent Auction Bid Sheet

Texas Exes _____ Chapter

SILENT AUCTION BID SHEET
Annual Scholarship Benefit
(Please refer to Silent Auction Rules)

ITEM #: _____ VALUE: \$ _____

DESCRIPTION: _____

DONOR: _____

BEGINNING BID: \$ _____ MINIMUM TO RAISE: \$ _____

	Name	Phone Number	Bid
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
5.	_____	_____	_____
6.	_____	_____	_____
7.	_____	_____	_____
8.	_____	_____	_____
9.	_____	_____	_____
10.	_____	_____	_____

Sample Scholarship Application

* Below is just a sample of the first 2 pages. You can access the full scholarship application at <http://www.texases.org/userdocs/policyregardingtheuseofthesilhouettelonghorn.pdf>



Texas Exes Scholarship Foundation
Chapter Scholarship Application
 2011-2012 Academic Year

Important: If you are a recruited athlete, DO NOT include any information about your athletic participation or achievements on this application.

Personal Information

UT EID _____ Male Female

Name _____
 First Middle Last Preferred

Email Address _____
Please list an email address that you will continue to use through the summer.

Permanent Address _____
 Street Address _____
 City State Zip Code

Home Phone _____ Cell Phone _____

Academic Information

Have you been admitted to The University of Texas at Austin? Yes No

UT School/College _____

Major _____

High School _____ Graduation Date _____
 Name _____
 City Zip Code County

SAT Total Score _____ ACT Total Score _____
 Reading _____ Class Rank _____ of _____ students
 Math _____ # of students with this rank _____
 Writing _____ GPA _____ on a scale of _____

Extracurricular Activities

In order of importance to you, list up to six extracurricular activities and the position(s) you held.

Organization/Activity	Position(s) Held	Year(s) 9 th , 10 th , 11 th , 12 th	Brief Description of Activity

Sample Scholarship Guidelines/Endowment Agreement

Texas Exes _____ Chapter/_____ (donor or memorialized or honored person's name) Endowed Scholarship

Texas Exes Scholarship Foundation®
The University of Texas at Austin

Background: (Information about how and why the fund is being/was established, and some background information about the award or its donors or the person being so honored.)

Eligibility: (List the scholarship selection criteria including area from which recipient pool will be taken – usually entering freshmen from the county. Note whether a student who has received the award can renew it as a continuing UT Austin student.)

Selection: Selection of recipient or recipients will be made by the Chapter's volunteer scholarship selection committee comprised of at least three persons who are current Texas Exes members. Final approval is to be given by Scholarship Committee of the Texas Exes Scholarship Foundation.

Amount: The scholarship was endowed with a total initial deposit of \$ _____ (at least \$7,500). Additional contributions may be made to the scholarship at any time. The fund will be invested and administered within the established fiduciary policy of the Texas Exes, and their Investment Committee will set the amount to be awarded to recipients each year. The Investment Committee sets administrative fees that are paid to the money managers, investment consultants and the Association. The fees are based on the market value of the fund and are taken from the fund each year. Any earnings not awarded to the recipients each year will be returned to the fund to provide for fund growth.

Presentation: The scholarship will be presented at the Texas Exes Scholarship Foundation's annual chapter scholarships awards event or at another appropriate public occasion.

Alterations: The terms of this scholarship may be altered by the Board of Directors of the Texas Exes Scholarship Foundation if it is determined that the terms no longer provide the significant award which was originally intended

Signature of Chapter Representative

Date

Jim Boon, Executive Director
The Texas Exes Scholarship Foundation

Date

Sample Chapter Survey

What types of events would you attend if they were offered by the Texas Exes Chapter?

- Game watching parties
- Thirsty Thursdays
- Texas Independence Day celebration
- A cultural event at a local museum
- Family-oriented event, such as a picnic
- Business networking event/speaker series
- Community service event
- Sporting event, such as a basketball game

Which of the following times would you be more likely to attend a speaker/networking event?

- Weekday breakfast
- Weekday lunch
- Weekday evening
- Weekend

Which of the following speakers would be a draw for you to attend an event?

- An Athletics speaker
- University speaker (Dean, professor, etc.)
- Local alumni
- None, I don't need a speaker to attend

Would you attend game watching parties for:

- Football regular season games
- Football bowl game
- Basketball regular season games
- Basketball tournament games (March Madness)
- Baseball tournament games (College World Series)

Where would you be most likely to attend a Chapter event? (click all that apply)

- Listing of areas in town

Are you currently a member of the Texas Exes?

- Yes
- No

Would you be willing to host a Chapter event in your home or place of business?

- Yes
- No

If yes, please list your name and the best way to contact you.

Would you be willing to serve as a volunteer with the Chapter/Network?

If yes, please list your name and the best way to contact you.

If you have any additional feedback on what your alumni association can do to assist the unique needs of alumni in the Chapter area, please let us know!

Texas Exes Insight into Industries Proposal

Benefits to the Chapter:

- Hosting a different, unique event that will draw in a different crowd
- Offering a networking event to alumni in the area

Date:

- We have found that Tuesdays and Wednesdays work best for networking events

Location:

- Bar or restaurant
 - Someplace with a private room with capacity for at least 75

Price:

- Typical price points
 - \$20 for Texas Exes members/\$25 for non-members
 - Includes two drink tickets and heavy hors d'oeuvres
 - \$10 for Texas Exes members/\$15 for non-members
 - Includes heavy hors d'oeuvres only with cash bar

Industries represented:

- Have representatives from industries that are dominant in the area
- Examples of past industries in other cities
 - Career Transition
 - Finance
 - Marketing
 - Real Estate
 - Telecommunications

Industry representatives:

- Should be UT alumni
- More than one representative per industry
 - If possible, diverse representation per industry
 - For example: Representatives at different stages of their career
- Representatives targeted, pre-selected, invited, and confirmed prior to event
- Purpose of industry representatives
 - Discuss their experience in their particular field with interested alumni
 - Answer questions from alumni
 - Talk about their experience breaking into their field
 - Offer guidance on breaking into the field, if applicable

Tentative Program (can fluctuate starting times – in commuter-heavy cities, it may be better to start later):

- 6:00 – 6:30 Registration
- 6:30 – 6:50 Overview of event and introduction of industry representatives
 - 6:30 – 6:32 Welcome by Chapter president/MBBA president
 - 6:32 – 6:40 Overview/purpose of event
 - 6:40 – 6:50 Introduction of industry representatives
- 6:50 – 8:00 Networking

Texas Exes Contacts and Important Dates

Key Staff Contacts

Chapters Department

Courtney Ratliff

512/475-9352 or 800/594-3937

ratliff@alumni.utexas.edu

Public Relations

Erin Huddleston, Director of Communications

512/471-3805

huddleston@alumni.utexas.edu

Scholarships

Kristy Kimball, Scholarships Coordinator

512/471-8833

kimball@alumni.utexas.edu

For a complete staff directory, please check the website –
www.TexasExes.org/about/staff.aspx

Important Dates

September 2, 2011	Chapter Leadership Conference
November 4, 2011	Texas Exes Fall Council Meeting
March 2, 2012	Texas Independence Day
May 15, 2012	Deadline for Scholarship Information to be given to Association
June 1, 2012	Deadline for Chapter and Network Renewal
July 1, 2012	Beginning of Chapter and Network Year

For important Texas Exes events, please check the website – www.TexasExes.org

Chapters for 2011-12

Alaska	Kansas City
Alice	Kerr County
Amarillo	Lake Granbury
Arlington	Lake Ray Hubbard
Atlanta	Laredo
Austin	Lavaca County
Austin County	Limestone-Freestone
Baltimore	Los Angeles
Bastrop County	Lubbock
Bay Area	Lufkin
Baytown	Matagorda County
Bell County	Mexico City
Boston	Middle Tennessee
Brazoria County	Midland
Brazos Valley	Montgomery County
Brownsville	New Jersey
Caldwell County	New Orleans
Calhoun County	New York
Central Mississippi	Orange Co. (TX)
Chicago	Orlando
Cincinnati	Palestine
Colorado County	Panola Co.
Comal County	Paris
Coppell	Philadelphia
Corpus Christi	Phoenix
Cuero	Refugio
Dallas	Rocky Mountain
Del Rio	San Angelo
Dimmitt County	San Antonio
El Paso	San Diego
Fayette County	San Francisco
Fort Bend County	St. Louis
Fort Worth	Texarkana
Fredericksburg	Tulsa
Gregg County	Twin Cities
Guadalupe County	Tyler County
Harrison County	Tyler-Smith County
Henderson County	United Kingdom
Hidalgo-Starr	Upstate South Carolina
Highland Lakes	Victoria Area
Hill County	Waco
Hopkins County	Washington County
Houston	Washington DC
Huntsville	West Central Texas
Johnson County	West Pennsylvania

Networks for 2011-12

Abilene Network
Baton Rouge Network
Birmingham Network
Central Oregon Network
Charlotte Network
Denton Network
Galveston Network
Hawaii Network
Jacksonville, FL Network
Las Vegas Network
Lexington Network
Memphis Network
Milwaukee Network
Monterey Bay Network
Nebraska Network
North Alabama Network
Northwest Arkansas Network
Oklahoma City Network
Orange Co. (CA) Network
Ozarks Network
Palm Beach Network
Portland Network
Puget Sound Network
Red River Network
Research Triangle Network
Rhode Island Network
Sacramento Network
Santa Fe Network
Southeast Texas Network
Tallahassee Network
Tampa Bay Network
Treasure Valley, ID Network
West Virginia Network
Wharton County Network

Chapter Advisory Board Assignments

<p><i>Brayshaw, Thomas</i> H: 830/990-4523 B: 830/997-5780 E: TBrayshaw@alumni.utexas.net</p>	<p>Brazos Valley Colorado County Cuero Fayette County Fredericksburg Kerr County Lavaca County Palestine Panola County Refugio Texarkana</p>	<p><i>Carrizales, Mike</i> B: 361/876-3692 E: mikecarrizales@alumni.utexas.net</p>	<p>Alice Austin Bee County Brownsville Calhoun County Corpus Christi Hidalgo-Starr Longhorn Village Mexico City Paris, TX United Kingdom</p>
<p><i>Carty, Nate</i> C: 972/896-7253 E: ncarty97@gmail.com</p>	<p>Boston Jacksonville, FL Network New Jersey New York Palm Beach Network Philadelphia Research Triangle Network Rhode Island Network South Florida Tallahassee Network Tampa Bay Network Washington, DC West Pennsylvania</p>	<p><i>Duchin, Jeff</i> B: 214/859-1718 E: jduchin@swst.com</p>	<p>Arlington Coppell Dallas Fort Worth Gregg County Hill County Johnson County Lake Ray Hubbard Limestone-Freestone Red River Network Southwest Dallas County Waco West Central</p>
<p><i>Glander, Troy</i> B: 210/822-6666 E: tglander@lawdcm.com</p>	<p>Austin County Comal County Guadalupe County Henderson County Highland Lakes Hopkins County Lexington, KY Network Northwest Arkansas Network Ozarks Network San Antonio Tyler-Smith County</p>	<p><i>Gragg, Steven R.</i> C: 602/525-3823 B: 602/229-5974 E: steven.gragg@alumni.utexas.net E2: steven.gragg@cushwake.com</p>	<p>Alaska Atlanta Birmingham Network Chicago Memphis Network Nashville Phoenix Portland Network Puget Sound Network Santa Fe Network Treasure Valley, ID Network</p>

<p><i>Heller, Richard</i> C: (512) 791-7955 E: rdheller@gmail.com</p>	<p>Amarillo Caldwell County Del Rio Dimmitt County Laredo Lubbock Nebraska Network Southeast Texas Network Tyler County West Virginia Network</p>	<p><i>Lewis, Kenneth</i> B: 713/403-2002 E: kjl@alumni.utexas.net</p>	<p>Baltimore Baton Rouge Network Baytown Bay Area (Texas) Galveston Network Houston Kansas City Mississippi New Orleans Orlando Rocky Mountain (Denver) St. Louis Upstate South Carolina</p>
<p><i>Liao, Kenny</i> B: 415/694-1286 E: liao.kenny@gmail.com</p>	<p>Central Oregon Network Charlotte Network Cincinnati Hawaii Network Las Vegas Network Los Angeles Monterey Bay Network Oklahoma City Network Orange County (CA) Network Sacramento Network San Diego San Francisco Twin Cities</p>	<p><i>Perez, Mike</i> B: 281/338-1203 E: mperez80@comcast.net</p>	<p>Brazoria County Fort Bend County Harrison County Huntsville Matagorda County Montgomery County North Alabama Network Orange County (TX) Victoria Washington County Wharton County Network</p>
<p><i>Squire, David</i> B: (512) 457-5854 E: dasquire@alumni.utexas.net</p>	<p>Abilene Network Bastrop County Denton Network El Paso Lake Granbury Lufkin Midland Milwaukee Network San Angelo Tulsa</p>		