



Texas Exes. We are target marketing and communication to these members during their first year.

- Our new logo launched in March and we are slowly phasing out collateral and merchandise with the old logo. We do not expect you to throw out items with the old logo, but please make sure to re-order any items with the new logo.
  - We will be working with the new marketing director as well as members as the Chapter Advisory Board in the upcoming months to discuss how to best utilize chapter membership chairs to support our membership efforts.
- Overview of High School Teacher Awards – Gina Schrader
- Gina discussed our Texas Exes Awards for Outstanding Teachers and how local chapters can get involved by contacting their local principals and encouraging them to nominate local, deserving teachers.
- UT and Texas Exes Traditions – Jim Nicar
- Jim entertained us all with a brief history of some of the traditions special to The University of Texas.

### **Afternoon Break Out Sessions**

➤ New leader orientation

Staff Facilitator: Erin Naman

Volunteer Facilitator: Kenneth Lewis

- See handouts: New Leader Orientation – Chapter Resources and New Leader Orientation Texas Exes Overview for discussion points

➤ Events break out session (incorporating family friendly and unique events)

Staff Facilitator: Courtney Ratliff

Volunteer Facilitator: Nate Carty (Session 1), Kenneth Lewis (Session 2)

Handout: Event Planning Toolkit

#### **Session 1**

- Have Game Watches at Family Friendly Bars
- Watch parties could be at someone's house
- "Starving Sunday" eat meals together on Sundays in the summer either at family friendly restaurants or pot luck at someone's house
- "Day in the Country" example from Fort Bend Chapter. Have a petting zoo, clowns, bbq lunch-big family picnic
- "Bevo Bingo" family bingo with ice cream, Bevo to show up if possible
- Events with local sports (minor leagues etc.) tickets usually cheaper than major league
- Take advantage of local rodeos and go as a group
- Family Day events (example Dallas Chapter) have a bounce house/face painting/petting zoo etc.
- Team up with local venues for discount group prices (example New York chapter)-team up with local zoos/aquariums(usually lies to give group packages in order to get new consumers)
- Team up with other Big 12 groups and have softball/kickball tournaments
- Team up with other Big 12 groups and host family picnics together.
- Tour local museums

- Family movie days
- Join rival Big 12 group and host a chili cook-off
- Promote promote promote! (emails/website/local newspapers etc)

## Session 2

- Flag Football/Chili Cook-off teaming up with other alumni groups (Big 12)
- Piggy Back on community volunteer work (i.e. Habitat for Humanity)
- Family Day events with things to do for both adults and children
- Deer Cleaning Station (teaching children a trait important to your community- thanks Kenneth Lewis)
- Kid Baking day (i.e. make your own pizza night)
- Speakers do not necessarily have to be chapter involved, can be someone important to the community but not necessarily UT
- Teaching class local-have UT or community college professors demonstrate/teach for the whole family
- Participate in bowling league
- Check events by local churches for ideas
- Get more involved with activities already happening locally (i.e. county fairs)
- Events do not always have to have a speaker or raise money!!!

### ➤ Unique issues facing our smaller chapters break out session

Staff Facilitator: Elizabeth Morgan

Volunteer Facilitators: Bill Morrow, Jeff Nash

- Recruit members to lead events and invite to board meetings
- Fundraisers
- Get parents of current students involved
- Look at including surrounding counties in events
- Utilize online tools
- Good refreshments
- Look at other chapter websites
- Make business cards for your chapter to hand out easily
- Advertise having a baby sitter for events
- Healthy competition with other alumni

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### ➤ Fundraising and Sponsorship break out session

Staff Facilitator: Erin Naman

Volunteer Facilitators: Mike Carrizales, Jeff Duchin

Handouts: Chapter Sponsorships

- Event Sponsorship/underwriter programs
- Takes time to evolve
- Adapt what will work for your community
- Matrix for approaching corporations/individuals
- Monetary partnerships
- Offering special ticket rates portion comes back to chapter
- Importance of maintaining long term relationships
- In-kind sponsors
- Provide demographic information

➤ Out of State Chapters break out session

Staff Facilitator: Elizabeth Morgan

Volunteer Facilitators: Steve Gragg, Jeff Nash

- Game Watching events with a family friendly environment/ good location
- Texas Independence Day Celebration
- Networking Events
  - attendance tied to speaker
  - holding at a Texas Ex business
- Bringing in UT/Texas items for raffles/fundraisers
- Create online auction for all chapters to use products
- Relocation center (i.e. NY website)
- Longhorn Loyalty Card (get businesses in area to offer discounts or partial proceeds to members)
- Chili Cook-off with other Big 12 Schools (LoneStar Chili Cook-off)
- Kerby Lane Breakfast (use Kerby Lane batter)
- Connect with Development
- Bring in Students from UT to help recruit to area (i.e. NY Seminar)

➤ Marketing and Promotion break out session

Staff Facilitators: Kim Gundersen and Erin Huddleston

Volunteer Facilitator: Al Sommers

Handouts: Marketing and Promotion – Chapter Resource Overview and Marketing and Promotion – Tips for Success

**Larger Chapters – Strengths**

- large turnout at events
- engaging young alumni through targeted events
- converting young alumni into volunteers
- family day events
- sponsorships for events and its relation to advertising

**Larger Chapters – Challenges**

- proximity to Austin
- hard to get people involved because there is so much going on in your city
- hard to serve all communities and all demographics
- attracting more established alumni in the area to get involved
- succession of leadership

**Smaller Chapters – Strengths**

- dedicated volunteers
- kid friendly events
- know the community and usually have one event that attracts participants (usually fundraiser)

**Smaller Chapters – Challenges**

- not enough people coming in to the community, especially younger people
- not enough “new blood” on chapter boards and in other volunteer roles
- having a hard time leveraging different forms of communication and using our help to communicate to community
- low attendance at events

### **Opportunities**

Try to engage SAHMs (Stay at Home Moms). This is a group of alumni who want to be involved but have limited time to volunteer or attend events. Start a baby sitting co-op in your area and/or ask SAHMs to help the chapter by doing things from home.

Develop a partnership with a local bar/restaurant for game watch parties that is lucrative for both the venue and the chapter. (i.e. sponsorships, contributions to the chapter or freebies)

Create chapter teams for local races or other events that are conducive to having a unified presence.

Be sure you are utilizing the Texas Exes to send out your broadcast e-mails and mailings. If you're keeping your own lists you are not using the most up-to-date information and are likely missing large sections of alumni in your area.

**Areas of Need** If you're interested in exploring any of the following please contact Erin Naman or Courtney Ratliff.

Demographic Data – The Texas Exes can help you better understand the demographics of the alumni in your area.

Some chapters asked for help getting a young alumni group started as more new graduates are moving to the area.

# **CHAPTER LEADERSHIP CONFERENCE HANDOUTS**





## **New Leader Orientation – Texas Exes Overview**

- 1) Texas Exes Mission Statement
  - a) To unite, inform and involve alumni and friends for the purpose of promoting, preserving, and protecting The University of Texas.
- 2) Membership
  - a) The Texas Exes is a dues-based organization
    - i) Membership funds the chapter and network program
  - b) Chapter/network role
    - i) Ask for your support in our membership efforts
    - ii) Promote the Texas Exes and the importance of membership through events and involvement
  - c) Chapter and network dues
    - i) Chapters and networks cannot charge additional dues
- 3) Scholarships
  - a) Chapters can raise funds to give as scholarships to local students attending UT Austin.
  - b) Each chapter receives \$500 in scholarship matching funds
  - c) Chapters can also start a scholarship endowment with \$7500
- 4) Chartering requirements
  - a) Chapters
    - i) Signed charter agreement
    - ii) Officer report – officers must be Texas Exes dues paying members
    - iii) Annual Financial Report
    - iv) Copy of Texas Exes by-laws on file with the Texas Exes
  - b) Networks
    - i) Signed network agreement
- 5) Deadlines
  - a) The deadline to turn in paperwork for scholarships is June 1<sup>st</sup>.
  - b) The deadline to turn in chartering paperwork is June 1<sup>st</sup>
  - c) The chapter and network year runs from July 1<sup>st</sup> to June 30<sup>th</sup>
- 6) Chapter Contacts
  - a) Director of Chapters – Erin Naman – [Campbell@alumni.utexas.edu](mailto:Campbell@alumni.utexas.edu) – 713/963-9078
  - b) Chapter Services Coordinator – Courtney Ratliff – [Ratliff@alumni.utexas.edu](mailto:Ratliff@alumni.utexas.edu) – 512/475-9352



- What is the objective of the event? Is it social, networking, family friendly, volunteering in the community or a combination?
  - Target Audience
    - Who is your target audience? Who do you want to attend this event? Who has attended similar past events?
    - Will this event attract new participants
  - Past events
    - What events were successful in the past? What do you think made them successful?
- Selecting a date
  - Consider the following when choosing your date
    - Conflicts with other events in your area or holidays
    - Location availability
      - Are you flexible on the location or is it important to the success of the event?
    - Time of the event
      - In a big city, does the start time leave enough time for alums to arrive after work?
    - Lead time
      - Is there enough time to successfully promote your event?
- Selecting a location
  - Consider the following when choosing your location
    - Centrally located venues are ideal
      - Survey your alumni to find out which area of town works best for them
      - Will the venue be hard to get to at that time of day?
    - Unique locations will draw people to your event
      - Alumni will attend an event if it's at a venue that they don't usually have access to.
    - All costs involved
      - Rental fees, catering, equipment rentals, parking fees, etc
      - Does hosting the event there justify the cost you will need to charge to cover the expenses?
    - Set up of the facility
      - Is the room large enough to accommodate your expected number of attendees?
      - Is the room too large? Events that are held in venues that are too large tend to seem emptier than they are.
      - If it's outside, is there an alternative rain plan?
    - Parking
      - Is it easy and accessible?



**To make your communications most effective make sure to include the following:**

- Name of event
- Description of event
- Time of event
- Location of event
- RSVP deadline
- Cost per person
- Event details – dinner, cash bar, ect
- Parking information
- Information on attire
- Contact information for questions
- Information on speaker, if applicable





## Budget

Expected Attendance: \_\_\_\_\_

Admission Price: \$ \_\_\_\_\_ Texas Exes Members \$ \_\_\_\_\_ Non members

### Projected Expenses:

Facilities/room rental charges	\$ _____
Set up charges/fees	\$ _____
Rental equipment (a/v, tents, tables, chairs, risers, etc)	\$ _____
Food	\$ _____
Beverages	\$ _____
Bartender and server fees/gratuities	\$ _____
Decorations	\$ _____
Entertainment	\$ _____
Miscellaneous (photos, speaker travel expenses, supplies, etc)	\$ _____



## Event Planning Timeline

### 4 to 6 months in advance Date \_\_\_\_\_

- Confirm event date with Chapter Board
- Reserve venue for event
- Set the budget
- Start collecting donations for auction items, if applicable

### 2 to 3 months in advance Date \_\_\_\_\_

- Finalize the details: menus, bar arrangements, speaker (if applicable), cost, etc
- Assign specific jobs to Board and/or committee members
- Decide how to take reservations and deadline for reservations
- Rent any equipment needed

### 9 weeks in advance Date \_\_\_\_\_

- Send details for paper mailing to Texas Exes, if applicable

### 6 to 8 weeks in advance Date \_\_\_\_\_

- Paper mailings should be in the mail, if applicable
- Order any supplies or decorations needed
- Post event on chapter website
- Send out save the date email
- Invite any special guests

### 3 weeks in advance Date \_\_\_\_\_

- Send out email to announce event
- Begin work on paper program

### 2 weeks in advance Date \_\_\_\_\_

- Confirm with speakers
- Finalize program and get to printer

### Week of event Date \_\_\_\_\_

- Final headcount to caterer
- Print out rosters for event, if applicable
- Put together materials for the event – sign sheet, membership brochures, nametags, pens, etc
- Finalize all auction items



## **Post Event Checklist**

**Provide the following to pass on to future event coordinators:**

- Copy of invitation and all other marketing materials
- Copy of program
- Speaker/Entertainment with contact information
- Copy of menu
- Copy of committee list
- Photographer with contact information
- List of decorations used
- List of auction items
- Notes on what worked/what didn't work



## Chapter Sponsorships

### Sponsorship Guidelines

- What chapters can offer sponsors
  - Their company name listed on all of the chapter's email blasts with a link to their website.
    - When soliciting businesses for possible sponsorships include the number of people/emails this will touch and how many emails will be sent
  - Their name and logo on any paper mailings to local alumni, if appropriate.
    - Include the number of addresses the mailing is going to
  - Their name and logo on any signage
    - Indicate where the signage will be located and how many people will have access to the signage
    - Let them know at how many events will the sign(s) will be displayed
  - Sponsorship credit on the chapter website with a link to their website.
  - Recognition with name and/or logo in the *Alcalde*, if the chapter is buying an ad for their event.
    - This reaches approximately 70,000 Texas Exes members
    - Note: the inclusion of a sponsor logo in the *Alcalde* is an extra \$200
  - Recognition on tables at the event and the event program, if appropriate
  - Complimentary tickets to event(s), if appropriate
- What to avoid
  - Anything that will look too commercial – needs to promote the chapter or event first, not the product
  - Anything that could jeopardize the Texas Exes non-profit status or would conflict with a standing Texas Exes partner. If you have a question, contact Erin Naman at [campbell@alumni.utexas.edu](mailto:campbell@alumni.utexas.edu) and she will get an answer for you.

### Tips for building a sponsorship program

- Identify local alumni in your area who are either businesses owners or can help you gain a sponsorship.
  - If they have an existing relationship with UT they are more likely to say yes.
- When you approach them, come armed with all the benefits their company will receive by sponsoring your event.
  - The Texas Exes can give you a demographic breakdown for your chapter.
    - For example: we can tell you how many email addresses we have in your area, how many alumni we have in a certain age range, etc.  
(\*Please note that the Association or Chapter **will not** share e-mail or USPS addresses with sponsors)
  - The more pertinent data you present them with, the more impressive.

- If appropriate have several donation levels.

Make sure to have a written contract once a sponsorship has been decided on.





- a) What is the intended result of the message? Keep the following 5 I's in mind when communicating with alumni. Each message should do at least one of the following:
    - i) Inform
    - ii) Interest
    - iii) Involve
    - iv) Invite
    - v) Inspire
  - b) Be specific in your message
  - c) Make to always include the following:
    - i) Date
    - ii) Time
    - iii) Location
    - iv) Contact/RSVP
    - v) Cost
- 9) Promote events through multiple avenues
- a) Increases the odds that alumni are seeing the message
  - b) Ex: Promoting a speaker event through emails and listing the event on the Event Calendar section of the local newspaper
- 10) Timing
- a) Leave enough timing to promote the event
    - i) If the RSVP deadline is one week before the event make sure the invitations arrive with enough time for them to reply
  - b) Paper mailings should go out 4 to 6 weeks in advance
  - c) If appropriate, use email as a save the date 6 to 8 weeks in advance of the event
- 11) Branding
- a) Always use the chapter logo on all promotional pieces
    - i) Increases awareness of the chapter and the Association