



## Chapter Leadership Conference Notes Friday, September 10, 2010 Etter-Harbin Alumni Center

### Morning Session

- Welcome and Introductions – Jim, Texas Exes Executive Director, and Mike Carrizales, Chapter Advisory Board Chair
  - Jim discussed the following Association and University initiatives
    - Renovations to the Etter-Harbin Alumni Center
      - We are reconfiguring the building to add more office and meeting space. Construction will begin at the conclusion of football season.
    - Forty Acres Scholarship Program
      - This is a scholarship endeavor by the UT community to recruit and recognize exceptional students, to help enrich their lives and nurture their development as future leaders. This program will give UT a competitive advantage in attracting the nation's most talented students.
      - The scholarships are merit based, full ride, experiential scholarships.
    - Texas Exes Scholarship Foundation
      - The Texas Exes Scholarship Foundation was created this year and will house all Texas Exes scholarships, including the 40 Acres Program.
      - Jim is stepping down as Executive Director of the Texas Exes to take over as Director of the Texas Exes Scholarship Foundation as of January 1, 2011.
- Overview of Scholarship Changes by Kristy Kimball, Texas Exes Scholarship Coordinator
  - Texas Exes Scholarship Foundation
    - All scholarships will be under the umbrella of the newly created Texas Exes Scholarship Foundation. Please contact the scholarship department, namely Kristy Kimball at [kimball@alumni.utexas.edu](mailto:kimball@alumni.utexas.edu) for all scholarship inquiries.
  - Website
    - Two weeks ago, we launched our new website – [www.TexasExesScholarshipFoundation.org](http://www.TexasExesScholarshipFoundation.org). All scholarship information will now be housed on this site, which will always be a work in progress. Chapter leaders will still access scholarship documents (application, report form, newsletter, etc.) from [www.TexasExes.org](http://www.TexasExes.org) under the “Chapter Leader Resources” tab.

- New Deadline
  - Chapters will need to submit applications, the report form, and any money needed to supplement the scholarship award by **May 15<sup>th</sup>**. The new deadline will allow chapters to use their scholarships as a recruitment tool and play an integral role in helping bring the best students to the University. The national deadline to accept admission to a university is May 1<sup>st</sup>. Please make your scholarship offers before that date so that students can know their full financial aid package before accepting an admissions offer.
  
- Forms
  - It is important that all chapters use the current forms provided by Texas Exes. Some forms are turned in with outdated prices for Texas Exes Student Chapter/Camp Texas and with the old Texas Exes logo. We want to ensure that our current brand is being used and also that the information we receive from the chapters is correct. Any chapter turning in outdated forms will lose their \$500 matching funds from Texas Exes.
  
- Application Options
  - For the 2011-2012 academic year, the chapter scholarship application is undergoing a re-design. The previous application has been very compact and sparse in content. We have taken the application and expanded some sections and have added two essays. You will now have a well-rounded view of the applicant via the robust application.
  - Chapters will have different options in regards to applications:
    - Paper/Electronic Application
      - The application will still be available in paper form. There will also be an application created in Adobe PDF that will allow students to type directly in the application, save it, and email it to the chapter scholarship chair as an attachment.
      - You can view a sample of the updated application at [https://www.texasexes.org/userdocs/chapterscholarshipapplication\(2011sample\).pdf](https://www.texasexes.org/userdocs/chapterscholarshipapplication(2011sample).pdf)
      - **\*Kristy is still finalizing the paper application, so please do not distribute it.\***
    - Clearinghouse Applications
      - Chapters have the option of using the clearinghouse to receive scholarship applications. When entering freshmen apply for UT-wide scholarships using a general scholarship application (deadline December 1<sup>st</sup>), they have the option of selecting “Texas Exes Scholarships.” Those applications are then sent to Texas Exes for consideration of our general scholarships. If a chapter elects to participate in the clearinghouse, Kristy will pull copies of the applications from the chapter’s area. She has normally sent the applications to participating

chapters in early March, but due to the new deadline, participating chapters will receive the applications in early-mid February.

- Online Application
  - Kristy is excited to announce that she is working with our Lead Developer to create an online application for chapter scholarship applicants. Right now they are trying to figure out the logistics and best practices for accessing the application. More details will come throughout the fall semester, and the online application will be available for use **January 1<sup>st</sup>**.
- Pictures of Recipients
  - The annual scholarship Recognition Report underwent a re-design this year. We would like to include more pictures in the chapter scholarship section. If your chapter hosts an event to recognize your scholarship recipients, please email Kristy a picture so that she can include it in the report. The report design usually begins in early July, so she would need the pictures by mid-July.
  - All chapters who awarded scholarships for the 2010-2011 academic year will receive a copy of this year's Recognition Report in the mail next week. It will be sent to the scholarship chair listed on the Scholarship Report Form that was turned in with the applications.
- Overview of Exes for Texas Program by Letitia Cooper, Alumni Volunteer Coordinator and Admissions Counselor
  - Ways that alumni can get involved in the recruiting process were discussed, including the Exes for Texas program. **See handout for overview of Exes for Texas program**
    - If your chapter is interested in naming an Exes for Texas Chair, please send their information to Erin Naman. This officer will serve as the liaison between the Office of Admissions and the chapter.
- Overview of Admissions by Dr. Kedra Ishop, Vice Provost and Director of Admissions

### **Afternoon Break Out Sessions**

- Sponsorship Overview and Sponsorship In-Depth

Staff Facilitator: Erin Naman

Volunteer Presenters: Mike Carrizales, Texas Exes Corpus Christi Chapter, Nate Carty, New York Chapter, Jeff Duchin, Texas Exes Dallas Chapter

**Handouts:** <https://www.texasexes.org/userdocs/sponsorship.pdf>

- Please see the PowerPoint presentation listed above for the full notes from the presentation.
- There is value in your chapter that chapters can leverage when forming relationships with sponsors.
- Put it in writing once an agreement has been finalized.

- Can request a sample sponsor agreement (example in handouts above) from Texas Exes staff.
- Can take years to form a solid sponsorship program – be patient and keep working on it.
- When working with alcohol distributorships make sure to follow the laws as outlined in your state. The distributor and vendor will also help ensure that the applicable laws are being followed.

➤ Volunteer Overview and Volunteer In-Depth

Staff Facilitator: Suzanne Tamas

Volunteer Presenters: Thomas Brayshaw, Texas Exes Fredericksburg Chapter, Kenneth Lewis, Texas Exes Houston Chapter, Kenny Liao, Texas Exes San Francisco Chapter, Mike Perez, Texas Exes Fort Bend County Chapter

**Handouts:** <https://www.texasexes.org/userdocs/clcvolunteerpresentation.pdf>

- Please see the PowerPoint presentation listed above for the full notes from the presentation.
- It is hard work to recruit new volunteers but it is worth it.
- Volunteering should be fun.
- New volunteers bring about new ideas for the chapters.
- 4 Steps in Recruiting Volunteers Successfully, each step is equally important:
  1. Figure out why you need them.
  2. Figure out how to get them.
  3. Figure out what to do with them once you have them.
  4. Figure out how to keep them.
- Bus Theory – If everyone is working together, you will be on the right path.
- President must delegate.
- Volunteers are encouraged to bring along their friends, even if they are not a Texas Ex.
- A good pool to draw from for volunteers is the attendees at events. Always have a sign in sheet.
- Houston chapter discussed the Open House schedule that works for them and stressed the importance of getting the newly interested volunteers involved quickly after the Open House so that no momentum is lost.
- Use media such as TV runners at the bottom of the screen, local newspapers or email to promote volunteer opportunities. Email is encouraged the most because it is free.
- Plan the timing of volunteer requests not too far in advance, but with enough time to successfully plan out the volunteer tasks.
- Make volunteering easy to say yes to.
- Encourage volunteers to evaluate their job, it may bring about a new idea on how to make events better.
- Three L's of Volunteering:
  1. Look for good people.
  2. Listen to them.
  3. Let them shine.
- When volunteers are doing something that isn't right, give negative feedback in such a way that it presents other options to them. In other words, give them an option of a task(s) that will better utilize their talents.

- Be sure all job descriptions of volunteers are clearly defined and allow the volunteers to select what they want to help with instead of telling them what they can help with. If you have a list, match the list of tasks with the list of volunteers.
- Amy Frederick of Houston suggested using volunteerspot.com which is free to help with planning and scheduling volunteer event tasks.
- Chapter leaders need to remember to be respectful of volunteer's time.
- It is very important that the chair is organized for the volunteers so that the tasks needing to be taken care of are known ahead of time rather than when the volunteer shows up.

➤ New Leader Orientation

Staff Facilitator: Courtney Ratliff

**Handouts: New Leader Orientation – Chapter Resources and New Leader Orientation - Texas Exes Overview**

- Please see the handouts listed above for the full notes from the presentation.

➤ Communication Strategies

Staff Facilitator: Kim Gundersen, Jamie Puryear

Volunteer Facilitators: Dianne Powell, Texas Exes PR Committee, Rusty Shelton, Texas Exes PR Committee

**Handouts: Texas Exes Style Guide, Marketing and Promotion – Planning for Success, Marketing and Promotion – Chapter Resources Overview**

- Questions about marketing can be sent to Jamie Puryear at [Puryear@alumni.utexas.edu](mailto:Puryear@alumni.utexas.edu)
- Questions about publicity can be sent to Erin Huddleston at [Huddleston@alumni.utexas.edu](mailto:Huddleston@alumni.utexas.edu)
- Examples of press releases and media alerts can be found in the PR Toolkit ([https://www.texasexes.org/userdocs/chapterprtoolkit2009\(2\).pdf](https://www.texasexes.org/userdocs/chapterprtoolkit2009(2).pdf) )
- The PR Committee can help you with media lists for your area if you are in Texas and with editing releases. Also feel free to contact the committee if you have questions about a publicity plan for a specific big event.

➤ Events Brainstorming

Staff Facilitator: Courtney Ratliff

**Handouts: Events Planning Toolkit - <http://www.texasexes.org/userdocs/eventplanning-fullreport.pdf>**

- Event Planning and executing-Important to keep notes all through the year!
  - If you keep notes, you will have all information for the next year
  - Easy to pass information to next chapter leader
- Golf Tournament-One chapter asked if anyone else had had problems with trying to hold a golf tournament on a Friday. They had not sold well on theirs.

- Discussed that Fridays are hard in some areas because some areas of industry cannot take Fridays off.
- Suggestion given: team up with other Big 12 alumni to host a joint golf tournament. More buy-in.
- Teaming up with other alumni groups for events
  - Make sure everyone is pulling their own weight. Do not take on full responsibility
  - Get in writing any percentages of proceeds that will be split
    - For example: make sure if your group is pulling in 80% of attendees than you get 80% of proceeds
- Out of the “norm” TID events
  - New York does a Bull Riding competition- invites other schools but does not “partner” with them
  - Austin and Dallas do family friendly events
    - Austin brings in cheerleaders, Hook’em, games for kids, kids enter free, family friendly band etc.
- Surveys
  - Consider sending an event specific survey to those who attended the event. (emails collected during registration)
  - Easy to keep with the notes on the event and you will remember what everyone said the next year
- Speakers
  - If you want to do a speaker event- consider sport enthusiasts. They can get the crowd excited by their “insider” look at UT sports.
  - Ask other chapters for speakers they have used
- Game Watches
  - Send out a survey to find out where people would want to watch the games with options
  - Work with venue to try to get food specials or a percentage of proceeds
  - Make sure there is something in writing that will explain what will happen in case of a Pay Per View game and make sure you are guaranteed special space for your alumni.
  - For chapters that cover a large area-consider having multiple game watch locations
- General Event Ideas:
  - Change your venue
    - If you’ve had your event at the same location for a while, consider changing-some will come just for a chance to look at a new location
  - Team up with other close Texas Exes Chapters for your big events-larger alumni pull
  - Use local media!
    - Take advantage of your local newspaper/radio/online calendars etc.

## **UT Press**

- Celeste Mendoza, UT Press, spoke about opportunities for chapters to work with UT Press. She passed out the catalog of books that UT Press publishes. To request a copy of

the catalog email Celeste at [cmendoza@utpress.utexas.edu](mailto:cmendoza@utpress.utexas.edu). She spoke about book signings hosted by the Brownsville and Hidalgo-Starr Chapters in conjunction with the UT Press. In order to set up a similar book signing, email Celeste. They are excited to work with chapters/networks.

## **CHAPTER LEADERSHIP CONFERENCE HANDOUTS BELOW**

**Texas Exes Leadership Conference**  
**September 10, 2010**



### **What is Exes for Texas?**

Exes for Texas is the alumni volunteer group for the Office of Admissions. Exes for Texas provides UT alumni with the opportunity to connect with prospective UT students (and their families) in a variety of ways.

### **Why Exes for Texas?**

The best representative of The University of Texas at Austin is a satisfied graduate!

As an Ex4Tx volunteer, you can:

- Share your unique perspective and personal experiences about being a Longhorn with prospective students and parents
- Provide students with 1-on-1 contact throughout the college decision-making process
- Participate in as many—or as few—programs as your schedule and interests allows

### **Current Volunteer Opportunities**

#### **Receptions**

Regional centers across Texas and select U.S. cities host various events to expose high school students to the University of Texas at Austin. Alumni volunteers are crucial in creating a first impression of UT at these events! At a reception, you might volunteer for a Q&A panel, assist with check-in/registration or socialize with students and their families.

#### **Willing Contacts** (one-on-one phone/email project)

“Willing contacts” are alumni who have volunteered to contact a prospective student who has specifically requested to speak with an alumnus/a. These students are usually looking for someone who is willing to answer questions or share his or her personal UT experience. Some students prefer to be given an alum’s contact information, but in general, willing contacts should be prepared to initiate contact (i.e. send the first email or make the first phone call.) Either way, if you volunteer to be a willing contact, we will always give you advance notice when we share your information with a prospective student.

#### **Longhorn Connections** (call project – generally around 30 students per volunteer)

Longhorn Connections focuses on personal contact. Many other universities work to recruit the same high-ability students as the University of Texas at Austin. Personal contact by alumni helps to strengthen our image and public perception. Longhorn Connection volunteers call (or write to) a select group of admitted students to provide answers to questions and to encourage their interest in the University. Many students feel much more comfortable sharing their questions and concerns with someone who has been in their shoes; they often appreciate that an alumnus/a has taken the time to call.

#### **Elementary/Middle/High School College Fairs**

While our Counselors attend as many college fairs in their area as possible, we frequently rely on alumni volunteers to assist admissions personnel in answering questions or to serve as the sole UT representative in the absence of a staff member. During these fairs, you’ll visit with

prospective students to inform them about opportunities available at UT Austin, share your personal experiences and share some tips on how to make the best of their high school career.

### **Longhorns Lend a Hand** (service day)

The University of Texas declares “What Starts Here Changes the World.” Longhorns Lend a Hand is a community service day that demonstrates this mission by bringing former, current and future Longhorns together to make a difference in their communities. Alumni volunteers share their positive UT experiences while they work alongside prospective students.

### **How can we get involved?**

- Sign up at [www.ExesForTexas.org](http://www.ExesForTexas.org).
- Follow us on facebook at [www.facebook.com/ExesForTexas](http://www.facebook.com/ExesForTexas).
- Elect an Ex4Tx Chair for your Chapter.
  - Ex4Tx Chairs help keep the Chapter connected to the Office of Admissions and help spread the word to local alumni about Ex4Tx volunteer opportunities.

Please do not hesitate to contact me if you have any questions or suggestions! Our volunteers frequently contribute new ideas that enable us to expand our volunteer opportunities.

Hook ‘Em,

Tisha Cooper  
Alumni Volunteer Coordinator / Admissions Counselor  
Undergraduate Admissions Center  
The University of Texas at Austin  
p. 512. 232.3710 | f. 512.475.7473  
[Letitia.Cooper@austin.utexas.edu](mailto:Letitia.Cooper@austin.utexas.edu)



## **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 May 15<sup>th</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 – [Naman@alumni.utexas.edu](mailto:Naman@alumni.utexas.edu) – 713/505-1500
  - b) Chapter Coordinator – Courtney Ratliff – [Ratliff@alumni.utexas.edu](mailto:Ratliff@alumni.utexas.edu) – 512/475-9352



## New Leader Orientation – Chapter Resources

- 1) Chapter Basics
  - a) Chapter year – July 1<sup>st</sup> to June 30<sup>th</sup>
- 2) Chapter Resources Overview (for more details on any of the resources below please reference the Chapter Leader Handbook)
  - a) Paper mailings
    - i) 2 mailings per year – 1 to members only, 1 to members and non-members
    - ii) 2 color, tri-fold or postcard size
    - iii) Allow 3 to 5 business days to go to print from time design is approved
    - iv) Must hit mailboxes at least 3 weeks prior to the event
  - b) Emails
    - i) Chapter emails are sent weekly on Tuesdays, Wednesdays, and Thursdays
    - ii) Send email requests to Courtney and Erin to be sent out, need 2 business days for requests
    - iii) Emails need to be sent in final form with all information provided
    - iv) Emails are sent to all members and non members
  - c) Websites
    - i) We can host a chapter website through our website
    - ii) All chapter websites can be accessed through [www.TexasExes.org/ChapterName](http://www.TexasExes.org/ChapterName)
    - iii) Responsibility of chapter leaders to make updates
    - iv) Can take online registrations through the chapter's website
  - d) Surveys
    - i) We can run electronic surveys to email database
  - e) Chapter Advisory Board
    - i) Each chapter and network is assigned a Chapter Advisory Board representative
    - ii) Chapter Advisory Board members are a good resource as they are former or current chapter volunteers who can draw from their own experience.
  - f) Trademarks
    - i) Have permission to use our logo as well as the longhorn silhouette
      - (1) No changes can be made to the longhorn silhouette
      - (2) If having merchandise made with the longhorn silhouette a licensed vendor must be used
  - g) Insurance
    - i) Chapters and networks are covered under the Texas Exes insurance policy
  - h) Credit card Processing
    - i) The Texas Exes will process the chapter's credit card purchases at cost. The resulting funds can either be deposited directly into an endowment or a check can be sent to the Chapter's Treasurer
    - ii) Online donations to the chapter's scholarship fund can also be set up



## **Texas Exes Style Guidelines for Chapter E-mails and Ads**

Just as the e-mail templates help all chapter e-mails look like they're coming from the Texas Exes, it's important to follow the same style and grammar rules of other Texas Exes communication pieces. Here are a few helpful hints. If you have any questions about these guidelines or anything missing, please contact *Alcalde* editor Tim Taliaferro at [timt@alumni.utexas.edu](mailto:timt@alumni.utexas.edu) or 512-471-8086.

### **Dates**

- Spell out all days of the week
- Do not include th, rd, or st after a date (exception: March 2 may be referred to as March 2nd for Texas Independence Day)
- Abbreviate months when followed by a day, except for March, May, June, and July
- Do not include year unless it's necessary for clarity, like when referring to a past event date

### **Times**

- Lowercase and place periods between a.m. and p.m.
- Do not include minutes for times on the hour. Ex: 6 p.m. not 6:00 p.m.
- Use noon or midnight instead of 12 p.m. or a.m.
- Include spaces between time and a.m./p.m.

### **Phone numbers**

- Use hyphens, not periods or parentheses.
- Ex: 512-471-8839

### **E-mail addresses**

- Use all lowercase

### **Websites**

- For print (ads), do not include www. and capitalize the first letter. Ex: Texasexes.org
- For e-mails, it's OK to include www. for hyperlink purposes.

### **Alumni**

- Alumnus = general singular or a man
- Alumni = general plural or men
- Alumna = a woman
- Alumnae = women
- Alum and alums are OK to use
- RIGHT: He is an alumnus. We are alumni. Margaret Berry, a Distinguished Alumna of ...
- WRONG: I'm an alumni. She's an alumni.

## **Big 12**

- Always use numerals.
- WRONG: Big Twelve or Big XII

## **Forty Acres**

- Spell out. (Except when referring to the 40 Acres Scholars Program.)

## **Hook 'em Horns**

- Note direction of apostrophe. In general apostrophes point toward the numbers or letters they replace.

## **Etc.**

- Avoid using & in place of “and”
- Keep exclamation points to a minimum

## **E-mail Dos and Don'ts**

- Do tease some of your news and events in the subject line. “Weekly Newsletter” is a lot easier to pass up than “Meet A UT Football Legend” or “Cheer The Longhorns To Victory This Saturday”
- Think of this as a newsletter from the entire Texas Exes, not a personal e-mail.
- Do contact *Alcalde* editor Tim Taliaferro with any questions or concerns relating to style and grammar.
  - [timt@alumni.utexas.edu](mailto:timt@alumni.utexas.edu)
  - 512-471-8086



#### **4) Execute:**

- Be sure to follow through on the tactics by the due dates you set
- That being said, expect the unexpected
- Look for expertise within the chapter – the person sitting next to you might be a social media guru.
- Ask early for volunteer help if the strategy is going to require more bandwidth than one person can provide.
- Poll your fellow Chapter/Network leaders to find out if they have contacts with any media outlets you have pinpointed in the strategy section (newspaper, TV, community calendars, etc.). Ask for an introduction or for their help in carrying out the strategy.

***Bonus! You now have a marketing and promotions plan, strategy, and timeline that can be used as a template for the next committee year!***



- **Flickr:** Share photos from events, create online “scrapbook” of chapter events, etc.

## 7) Public Relations

- Each chapter should appoint a PR Chair to handle the marketing of events and general PR for the chapter
- **Tools of the Trade Tips, Templates and Samples** (provided online in the Helpful Forms section of the Chapter Leader Resources area):
  - News Releases;
  - Print (newspapers and magazines; broadcast: radio and TV);
  - Public Service Announcements;
  - Media Advisories;
  - Fact sheets;
  - Photographs (a picture is worth 1000 words!);
  - Letters to the Editor;
  - Op-ed pieces;
  - Interviews/Features;
  - Chapter newsletters;
  - Special events such as conferences or 5Ks;
  - Websites;
  - E-Mail;
  - Audiovisual materials such as PowerPoint presentations;
  - News Conferences
- Texas Exes can assist with identifying local media contacts and writing press releases

*For assistance contact: Director of Public Relations – Erin Huddleston,  
Huddleston@alumni.utexas.edu*