



## **HOW TO READ AND USE THIS HANDBOOK**

This handbook was created to guide Texas Exes Leaders as they build their chapter. The handbook includes information ranging from the structure of the Texas Exes Chapter Program to event ideas for chapters to implement. It is intended to be a comprehensive resource for all leaders to use as they grow their chapter. It is designed to give you an overall view of the Texas Exes.



## 2019-2020 CHAPTER HANDBOOK

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## **TEXAS EXES**

### ***Who we are:***

The Ex-Student's Association (ESA), or commonly known as Texas Exes, is an independent, non-profit, membership-supported organization that exists to promote and protect The University of Texas at Austin and unite alumni around the world.

### ***Our Core Purpose:***

To be an independent voice that champions the University, and to organize alumni and friends into a formidable network to change the world.

### ***Our Vision:***

Alumni of The University of Texas at Austin are known around the world for their collective contribution to society.

### ***Mission:***

Though we carry it out in countless different ways, the Texas Exes' mission is simple:

**Unite alumni and friends around the world, create a passionate voice that strengthens the university, promote alumni accomplishments, and celebrate Longhorn spirit and traditions.**

### ***What We Do:***

- Keep alumni connected and engaged with their alma mater
- Advocate on the university's behalf and support its mission
- Enrich the student experience before and during their time on campus
- Communicate the value of the university
- Foster a welcoming environment and home on campus for Longhorns and friends
- Preserve the traditions of the university

Whether it's through scholarships, teaching awards, legislative advocacy, *The Alcalde* magazine, or just plain fun (like hosting a huge tailgate party before every home football game), the Texas Exes exists to support The University of Texas and its proud traditions.

## **DID YOU KNOW...?**

...in 2018-19, Texas Exes gave out over \$4.1 million in scholarship money, allowing the great academic tradition of UT to continue. On the whole, 70 chapters and networks awarded \$52,540 to 303 students.

...that the Texas Exes Advocacy Department focuses on preparing our alumni—from educators, business analysts, social workers, and recent grads—for communicating with decision-makers on issues that directly affect students and professors on the Forty Acres. By staying well-informed on higher education issues, building relationships with legislative offices, and participating in flagship advocacy events, such as Orange and Maroon Legislative Day or Longhorns on the Hill, UT Advocates work to make sure our alma mater is strongly represented with lawmakers in Texas and Washington.

...that the Texas Exes strived to enhance the student experience by providing meaningful involvement through Texas Exes Student Membership, Camp Texas, Student Ambassadors, Texas Excellence Awards – outstanding student and faculty/staff awards, alumni mentoring programs, and leadership development. During the school year, the Texas Exes recruits dues-paying members and provide programming ranging from Dinner and Discussions with alumni, Study Breaks, day trips, and campus-wide spirit rallies. In addition, Camp Texas continues to provide a great start to the college experience for new freshmen and transfers students alike. This three-day orientation is the ultimate Longhorn welcome. From friendly chats with UT professors to learning Texas traditions and making new friends, students leave knowing what it means to be a true Longhorn.



## MEMBERSHIP

What does it make possible?

- The Texas Exes works to protect the value of your diploma and advocates on behalf of UT (which cannot lobby on its own behalf) vis-a-vis the Texas Legislature, for higher education funding and other needs.
- Scholarship Awards totaling nearly \$4.1 million last year
- Support for over 150 Chapters and Networks worldwide
- Over 70 Flying Longhorn trips each year
- *Alcalde* magazine stories- keeping alumni connected to their University
- Student programming such as Student Membership and Camp Texas
- And Much More!

### **Membership Levels**

**80% of your membership dues are tax deductible**

- Life Membership: 90% of your Life Membership dues go into an endowment-Support the university forever!
  - Individual- \$1000
  - Joint-\$1500
  - Seniors (age 65+)- \$850
  - Joint Seniors (age 65)- \$1,275
  - Recent Grads (within 5 years)- \$800
  - Joint Recent Grads (within 5 years)- \$1,200
- Life Membership (payment plan):
  - Individual: \$1000 (\$50 down and \$25 each month)
  - Joint: \$1500 (\$100 down and \$50 each month)
- Annual Membership:
  - Individual: \$60
  - Joint: \$80
  - Seniors (age 65+): \$50
  - Joint Seniors: \$70
  - Recent Grads (within 5 years): \$25
  - Joint Recent Grads: \$45

- Four Year:
  - Individual: \$200
  - Joint: \$260
  - Seniors (age 65+): \$170
  - Joint Seniors: \$220

For more detailed information on Membership, [click here](#).



## CHAPTERS

### What is a Chapter?

Chapters, both chartered and non-chartered, are local affiliates of the Texas Exes. Texas Exes Chapters fall into four different categories based on the prior year's accomplishments. In order to better allocate resources and champion the university, each category is allotted different resources.

**The various resources available to Chapters are more fully explained below in the category breakdown.**

The chapter year runs from July 1<sup>st</sup> to June 30<sup>th</sup>, same as the association's year. Chapter charters must be renewed every year, which is accomplished by filling out and submitting the required forms online to the Chapters and Networks Department in Austin (required forms vary based on category). ***All forms must be submitted by June 1<sup>st</sup>.*** Once the forms are received, the charter for each chapter is approved at the first Texas Exes Board of Directors meeting of the year. **A detailed explanation of the process and the documentation required for renewing a chapter's charter is located below.**

### International Chapter Overview

International Chapters provide a vital role to the Texas Exes – they are our connection at the local level. Texas Exes could not touch so many alumni, both members and nonmembers, without our chapters. Chapters help increase membership while maintaining a connection between alumni and The University of Texas.

Goals of International Chapters:

- Provide alumni with a connection to UT and the Texas Exes
- Provide activities that bring alumni together
- Provide diverse programming that represents various interests and age groups
  - Community Service
  - Serious Minded Content
  - Diverse Social Alumni Engagement

Purpose of International Chapters:

- Extend UT beyond the boundaries of the Forty Acres, Texas, and the U.S.
- Promote membership in the Texas Exes
  - Memberships sustain Chapter activities and are a critical link between members and the university.
- Support UT when members of the administration or faculty travel to your area

- Provide a network of fellow Texas Exes for new graduates and new members of your community
- Chapters are categorized by activity, rather than size. Different chapters will have different goals and expectations, and this is reflected with a 4-tiered structure. **International Contacts** should aspire to maintain and create contacts with alumni who share a foreign locale, with the goal to ultimately create a chartered network. **Non-chartered Chapters** have established contact with other interested alumni, and have committees working on Texas Exes branded communications. **Chartered Chapters** have an organized leadership structure and are committed to participate in Texas Exes branded events. **Outstanding Chartered Chapters** are going even further by raising scholarship funds and engaging in Texas Exes staff training.

Texas Exes Expectations:

- International Contact Expectations:
  - Up-to-date contact information for 1 Key Contact
- Non-Chartered Chapter Expectations:
  - 1 Key Contact required
  - Website or social media presence
  - Semi-annual newsletters with chapter-relevant updates on the University
- Chartered Chapter Expectations:
  - Chapter board of 4 officers required: President, President- Elect, Treasurer, and Membership Chair
  - Use ESA for communication through email
  - Host at least one event annually
  - Membership promotion in the intent increase membership in local area
  - Use sign-in information sheets at events and send to ESA
  - Any design created outside of ESA staff must have prior approval before use
  - Report on at least 1 board meeting annually
  - Produces an annual Financial Report for local bank account with unique EIN (if funds are taken in)
- Outstanding Chartered Chapter Expectations:
  - Raises scholarship funds with a minimum total contributed of \$500 per student
  - Participates in multiple Texas Exes events
  - Commits to annual leadership training by Texas Exes staff

*\*Expectations vary based on category, and not all are listed above.*

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
- When donations are received by the chapter, the donation is a tax deductible charitable donation to Texas Exes.

## COMMUNICATIONS

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

### *Chapter Website*

Each Chapter has their own webpage hosted on the Texas Exes website. It is the chapters responsibility to update their site with events, contact information, and chapter details. (see web manual below)

### *Emails*

Texas Exes will send out emails to all alumni in your area, based on category allotment. This is an efficient, cost-effective way to share information about the Chapter to your constituents. Chapter emails are sent out on Wednesdays, Thursdays, and Fridays of each week. Email content must be sent to the Chapters Coordinator at least two business days prior to the send date of the email.

### *Paper mailings*

Mailers paid for by Texas Exes depend on a chapters \*status. The paper mailings available to chapters are in the form of either a postcard or tri-fold invitation. A mailer request must be submitted a minimum of 6 weeks prior to an event. Texas Exes will pay for qualifying mailers for an event that is: community service, largest scholarship fundraiser, serious minded content, or another key priority event. Additional mailings or upgrades are at the expense of the chapter.

## CHAPTER EMAIL POLICY

### Requesting Emails

- All content should be submitted to <https://txex.es/chapteremails>
  - If you have questions about your submission, email Catherine Flores at [catherine.flores@texasexes.org](mailto:catherine.flores@texasexes.org)
- Submit the request form **at least 2 business days** before the email send date; this gives us enough time to create the email and send a proof.
  - Form must be submitted for every email you'd like to send, even if the email has repeat content; this allows for your email allotment based on your \* status to be tracked accurately
    - Ex. If email needs to go out on Friday, all content must be submitted by Wednesday morning.
  - If more than one person is contributing to the email, have everyone proof it and give their approval *before* sending to our staff.
    - Only one person in the Chapter will be sent the proof. Keep in mind that having more than one person look at the proof can delay the process.
  - Send date is contingent on proof/edit approval timeline from the Chapter leader who submits the form.
- Chapter emails are sent out on **Wednesdays, Thursdays, and Fridays** only.

### Email Policies and Tips

- Chapters are allotted **12, 20, 30, or 52 emails per year based on their \*status**
- Emails from the chapter should:
  - Include a creative and informative subject line
  - Have informative and educational content that is chapter focused
    - The info should promote chapter engagement and include at least one piece of content that is unique to the chapter
    - Ex. Chapter hosted event, alumni/student spotlight, letter from the board, etc.
  - University, community, and other information can be included as long as it is paired with information specific to the Chapter
  - Provide all information alumni would need to attend an event such as venue name, address, time of event, parking, where to purchase tickets, etc.
  - Include links to social media event pages, external ticket sales, etc.
  - Include Chapter contact information (social media, emails, etc.)
  - Above all else, your newsletter should match Texas Exes branding and content
- 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.
- Emails can and should be targeted to specific groups when appropriate
  - Example:
    - An email can be sent to alumni that graduated in a certain range of years.

## CHAPTER LEADER WEB MANUAL

### **Log In**

1. Go to TexasExes.org
2. Click **Log In** in the upper right corner
3. Enter your chapter's username (i.e. orlandochapter@texasexes.org).
4. Enter your chapter's password (provided by Texas Exes staff)

### **Find Your Chapter**

1. Hover over "Chapters and Networks" in the top navigation and select **Find a Chapter or Network**.
2. Select your chapter or network from the list.

### **Replace the Cover Photo**

*Tip: Images should be...*

- *Under 100MB*
- *.png, .gif, .jpg, or .jpeg format*
- *High resolution and not dependent on legible text. Since the cover photo is large, horizontal, and will have text overlaying it, images that are wide (at least 1200 pixels wide) and where type is not a crucial element are recommended.*

1. From your chapter's main page click **Edit** on the orange bar at the top.
2. Under "Chapter Featured Image" click **Remove**.
3. Click **Chapter Featured Image** to reveal the **Select Image** button, then click it.
4. Click **Choose File** and locate the image you'd like to upload from your computer's drive.
5. Select it and click **Open**.
6. Once the name of your file appears, click **Select Image** to upload the image to our server. A small version of the image will appear.
7. To preview how the image will be displayed, click the **Edit** button, then **Preview**. The "9x4" crops show how the photo will display. You can shift the photo up or down in the next step. Close this window/tab.
8. To change how the image is cropped, adjust the small white crosshairs up and down and click **Preview** to view the results.
9. Enter a simple description of the image in "Alternative Text." This text is useful for the visually impaired and may be displayed if an image is unable to load.
10. Click **Save** at the bottom of the dialog.
11. Scroll to the bottom of the page and click **Save** to return to your chapter main page.

### **Add a New Page**

1. From your chapter's main page click **Create a Chapter Page** in the side menu.
2. Click **Group Node (Standard Page)**.
3. Add a page title at the top. This is what will display at the top of the page and in the side menu.

4. Add your content (see Edit a Page).
5. Click **Save**.

### **Edit a Page**

1. Click **Edit** on the orange bar at the top.
2. On your chapter's main page, you can edit text, add photos, change the cover photo, or edit your social media links.
3. On a secondary page, you can edit text and add photos.

### **Editing Content**

1. To edit the text on your page click **Edit** on the orange bar at the top.
2. Scroll down to the big text entry field. In this box, you can add text and photos (see the following sections) to the body of your page.

*Tips: Don't forget to click **Save** at the bottom of the page when you're done. Use the **Preview** button at the bottom of the page to view your changes without saving.*

### **Formatting Text**

Available text formats:

- Normal, bold, italics
- Heading 2 (largest), 3 (medium), 4 (smallest)
- Bulleted and numbered lists
- Insert Horizontal Line
- Links and buttons

*Tip: To clear applied styles, click the **Remove Formatting** button that looks like a T with an x next to it.*

### **Create a Hyperlink**

1. Select the text you want to turn into a hyperlink, click the **Link** icon that looks like two links of a chain.
2. Type or paste the URL you would like to link to.
3. Click **Save** to return to the text editor.
4. To remove a hyperlink, select the text and click the **Unlink** button that looks like broken chain links.

### **Add an email address**

1. Select the text you want to turn into an email address, click the **Link** icon that looks like two links of a chain.
2. Type *mailto:* followed immediately by the address. *Example: mailto:chapters@texasexes.org.*
3. Click **Save** to return to the text editor.
4. To remove an address, select the text and click the **Unlink** button that looks like broken chain links.

## Create a button

1. Place your cursor on a new line and type the text of your button.
2. Highlight the text and click the **Link** icon (see above).
3. Type or paste the URL you would like to link to and click **Save** to return to the text editor.
4. At the top of the text window, click **Styles**, then select **Link Button**.  
*Tip: The appearance will only change slightly. To view a more accurate preview, refresh the text editor by clicking **Source**, then **Source** again.*

## Insert a downloadable file

1. Place your cursor on a new line and click **Embed File**.
2. Click **Choose File** and locate the file you'd like to upload from your computer's drive.
3. Select it and click **Open**.
4. Once the name of your file appears, click **Select File** to upload the file to our server.
5. *Optional: If you'd like to customize the link's text ("Web Handbook" instead of "web-handbook.pdf"), click the filename's link at the top of the dialog. Click **Edit** in the window that opens. Fill in the Description field (not the Name field) and click **Save** at the bottom of the page. Close the window to return to the Embed Media dialog.*
6. Click **Embed**.
7. To remove an embedded file, select the link in your text and hit the Delete key.

## Add a photo

1. To add photos to your page, click **Edit** on the orange bar at the top.
2. Place your cursor on a new line and click **Embed Image**.
3. Click **Choose File** and locate the image you'd like to upload from your computer's drive.
4. Select it and click **Open**.
5. Once the name of your file appears, click **Select Files** to upload the image to our server.
6. Click **Next** in the Review Selected Media dialog.
7. Select the proportions of your image under Display As. (see chart below)
8. Choose an Alignment. None (the default) will fill the column from side to side. Left will reduce your image to 25% and embed it on the left side of the paragraph that follows. Right will reduce your image to 25% and embed it on the right side of the paragraph that follows.
9. Click **Embed** to return to the Edit screen.
10. You can delete a photo by either clicking on it or placing your cursor after it and pressing the delete key until it disappears.

*Tip: A good use for Align Left and Right is a board member page with headshots accompanied by names. Click the **Horizontal Line** button between entries to help keep names and portraits aligned.*

- Max Only is your original, uncropped image.
- 1 x 1 square
- 3 x 1 landscape super-wide
- 9 x 4 landscape wide
- 3 x 2 landscape medium
- 9 x 10 portrait

- 2 x 3 portrait tall
- Max Only (Wrapped in Link) is clickable when a URL is specified

### **Add a table**

*As a rule, tables don't reconfigure themselves to fit mobile devices. One that's wider than half a page when viewed on a desktop computer may be partially obscured on a phone.*

1. Place your cursor on an empty line.
2. Click the the **Table** button in the edit control bar (it looks like a grid).
3. Specify the number of rows and columns, click **Submit**, and a small, almost-invisible grid of empty cells will be added to your text.
4. Add content by clicking in each cell and typing or pasting text.  
*Tips: Right-click on the table to **Add a Column** or **Row**.*

### **Edit social media links**

1. To change or add Social Media links to your page, click **Edit** on the orange bar at the top.
2. Scroll down and type or paste the URLs of your social media channels under Chapter Facebook Page, Chapter Twitter Page, etc. *Example: <https://www.facebook.com/TXExesLA>*
3. Click the **Save** button at the bottom of the page and test the links from your chapter's main page.

## **SOCIAL MEDIA GUIDELINES**

The Texas Exes encourages our chapters and networks to engage with the Longhorn community through social media. The following policy statement and guidelines are meant to assist you in your efforts, while protecting the interests and reputation of the Texas Exes. By posting as a chapter or network of the Texas Exes, you represent the Texas Exes and volunteers are expected to be aware of and adhere to these guidelines and policies whenever they use the Texas Exes name or brand.

### **Section 1: Policies for all Social Media Sites**

- **Inform us of your accounts:** When creating a new account for you chapter/network on any social media sites, email the Texas Exes staff at [TexasExesChapters@TexasExes.org](mailto:TexasExesChapters@TexasExes.org) letting them know the URL of your group, page, channel, etc. The Texas Exes will link these sites from our website and this will allow us to publicize your digital presence.
- **Naming and logo use:** All chapter/network social media sites should include Texas Exes and your specific chapter or network name in the site. Please use the format: “Texas Exes CITY Chapter” or “Texas Exes \_\_\_\_\_ Network” to ensure consistency. To be consistent with our brand, you are required to use your official chapter/network logo on the site. If you need a copy of your chapter/network logo, please contact the Texas Exes staff at [TexasExesChapters@TexasExes.org](mailto:TexasExesChapters@TexasExes.org). When setting up a Twitter account, please contact us for the Texas Exes Chapter Twitter background.
- **Transferring administrative status:** We know that chapter/network leaders change positions and sometimes rotate off boards. The current president should have administrative capabilities on your social media sites and your other board members should be given administrative capabilities as the chapter/network board sees fit. The current president should add incoming presidents to administrator status, and/or give them account administrator, but it is recommended that you remove the past presidents’ administrative status after one year if they no longer have an active role in the Chapter.
- **Respect copyright and fair use:** When posting, be mindful of the copyright and intellectual property rights of others. Do not use the Texas Exes logo or name to promote a product, cause, political candidate, or any other endorsement.
- **Terms of service:** Social media sites have their own terms of service. Make sure you obey these terms of service or your account with the site may be suspended.

### **Section 2: Guidelines for Social Media Use**

- **Respect and Ethics:** We encourage different viewpoints and opinions, and as a participant in social media, you should too. Be respectful of others’ viewpoints.
- **Accuracy and Honesty:** Double check facts and details before you post. Remember, once you post, it is out there. If there is a website you used to gather facts, provide the link for your readers to show accountability. Also, always write in the first person (we, us, our...). If you make a mistake, admit it. Your followers will be more willing to forgive and forget if you are up front and quick with your correction. Maintain a high level of quality that exhibits superior grammar, punctuation, and spelling.



- **Transparency and Disclosure:** It should be clear when posting opinions of any sort that views expressed are not necessarily those of Texas Exes.

### Section 3: Best Practices for Social Media

- **Value and Interest:** When posting to your blog, Twitter, Facebook, LinkedIn, Instagram, etc., ask yourself if the content adds value and interest to the discussion. Make sure your comment, post, or tweet is a valued piece of information. There are millions of people, companies, and universities on the web. If you want to stand above the clutter, make sure you provide content that is exciting, engaging, and stimulating.
- **Planning:** Putting in place a social media calendar of sorts for the year can help to organize you on how to cross promote your material and the times of year you when you know you will have big events and may want to do extra posts. Also, think about who on your board would be the best person to handle your social media needs and whether that is one person, or multiple people. Make sure you are consistently contributing content. You don't want to let your followers down by only posting a couple of times a year.
- **Join the Conversation:** Listening and responding to your constituents through social media sites is just as important as posting information. Make sure you are responding to posts and questions from your followers and fans. Remember that it isn't just about what you're saying: It is also about the connections your fans and followers are making to other chapter members through the site.
- **Be Brief and Link When Possible:** Ideally, posts should be brief; redirecting visitors to content that resides on another site. Whenever possible, link back to your chapter/network website or the Texas Exes website.

### Section 4: Social Media Tips by Platform

- **Facebook:** Most of our chapters/networks are well versed in the benefits that Facebook can provide, both in terms of communicating with current members and giving those who visit chapter events a place to connect with the chapter. Here are some ideas for Facebook:
  - **Events:** When creating events on Facebook, be sure to invite people! By inviting, you are promoting the event to go through other people's newsfeed who may not already follow the page. If a user says that they are "going to" or "interested" in the event, their friends will see it. This way, you are promoting the event/chapter or network page to a new set of people and expanding the opportunity to more.
  - **Interact:** Whoever is running the account should also be interreacting with other accounts through the chapter/network page. This could be through following a page, liking a post, leaving a comment, etc. Please share the event with the Texas Exes Association Facebook page, or make Texas Exes a Co-Host of the Facebook event, so that the event generates more reach.
- **Instagram**
  - **Graphics:** When using or creating graphics, be sure to use an image that is fun and going to draw the eyes of your followers, and limit the amount of text. Canva.com is a great resource for creating images.

- **Interact:** Whoever is running the account should also be interacting with other accounts through the chapter/network page. This could be through following a page, liking a post, leaving a comment, etc. Be sure to do so with accounts that support the integrity of the account and Texas Exes.
- **Twitter:** Twitter can be a great way to get small pieces of information out in a timely way.
  - **Follows:** Following other pages is a great way to show your community support and engagement. Follow local known individuals, establishments, city staples, etc. Doing so will increase your Twitter appearance. Example: If you partner with a bar for game watches, be sure to follow, tag, and interact with their page.
  - **Retweets:** Retweeting is a way to be active online through others' content. Example: retweet important @texasexes or @UTAustin content that would be beneficial to your followers.
  - **Interact:** Whoever is running the account should also be interacting with other accounts through the chapter/network page. This could be through following a page, liking a post, leaving a comment, etc. Be sure to do so with accounts that support the integrity of the account and Texas Exes.
- **LinkedIn:** Many who join Texas Exes do so for the networking opportunities—if your chapter doesn't have a LinkedIn group established, this can be a great way to connect your members to one another in a more professional environment.

## **INTERNATIONAL CHAPTER EVENTS AND ACTIVITIES**

Texas Exes Chapters 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 purpose of connecting with one another, promoting higher education, raising money for scholarships, or just having some fun, makes a good event for your chapter. 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.

We encourage chapters to participate in two categories of events: Key Priority Events and Social Alumni Engagement Events

### **Key Priority Events**

1. Student Development Events
2. Community Service Events
3. Serious Minded Content Events

1. **Student Development Events**: an event that encourages alumni to promote The University of Texas to potential and current students or raises scholarship funds.

- Dedicated Scholarship Fundraising Events (i.e chapter scholarship dinners)
- Student Send-Offs
- College Fairs, Recruitment Events
- Examples:
  - Host a BBQ and invite high school juniors and seniors to attend
  - Throw a Send Off for the students leaving your chapter area to attend UT

2. **Community Service Events**: an event that allows alumni to showcase the many ways in which they give back to the community as part of The University of Texas and Texas Exes.

- Participate in Texas Exes Project Worldwide in the month of February.
- Examples:
  - Participate in a Red Cross Blood Drive
  - Work with Habitat for Humanity
  - Participate in a community clean-up day
  - Participate in a local walk or run to support charity

3. **Serious Minded Content Events**: an event that joins alumni with the purpose of championing the university through continuing education and/or networking.

- **Business Networking**: The Texas Exes offer creative and innovative events that allow Longhorns the opportunity to come together for professional networking. Chapters have the unique opportunity of bringing Longhorns together in ways unlike any other networking groups. Organizing networking events can assist a Chapter in reaching out to local alumni and growing their group. For tips and ideas, click [here](#).

- Speaking Events (ex: UT Professor, UT Staff or Advocacy Speaking Events or Reception)
  - Tips for Hosting a Speaking Event:
    - 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.
      - You will need to fill out the form and return to the Athletics Department.
    - Contact The Texas Exes Staff to view the **Texas Exes Speakers Bureau** for speakers/topics that may be available for your area.
  - Topics:
    - Education, Athletics, Legislative Issues, Cultural Issues, Areas of Study, Law, Global Development, Entrepreneurship, Foreign Policy, Technology, Medicine, etc.
  
- **Continuing Education or Topic Events**
  - Contact Texas Exes Staff to view the **Texas Exes Speakers Bureau** for speakers/topics that may be available for your area.
  - Topics:
    - Education, Athletics, Legislative Issues, Cultural Issues, Areas of Study, Law, Global Development, Entrepreneurship, Foreign Policy, Technology, Medicine,
  
- **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

## Social Alumni Engagement Events

- **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
- **Young Alumni Events**
  - 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
- **Happy Hour**
  - Partner with a restaurant or bar for special deals for the Texas Exes chapter
    - Happy Hours are a great chance to promote membership and attract volunteers
  - Host a joint happy hour with the alumni chapter of an upcoming sports opponent and schedule it the week of the game.
  - 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
  - Host a wine/beer tasting or a winery/brewery tour
    - Can be done in someone's home or at a winery/brewery or restaurant
- **Local Sporting Events**
  - If there is a professional team in your area, then buy a block of tickets and host a 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.
  - Plan a bus trip to a game → especially fun for out of state Chapters if the football, basketball, or baseball team is playing nearby
  - Tailgate event to kick off the football season
    - Bring in “football experts” to talk to the crowd
    - Have a band end the event
  - Meet before or after the game at a local bar or restaurant
  - 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.
- **Intramural Leagues**
  - Create a sports team (softball, kickball, etc.) with alumni in your area.
- **UT Game Watching**
  - Partner with a local bar or restaurant to host UT Football Game Watches for your chapter.
    - Work with the bar/restaurant for special drink/food deals
    - Negotiate with the venue for scholarship opportunities (Example: some bars give a percentage of profits to the chapter's scholarship fund)

*\*Be sure to promote drinking responsibly at these events.*

## SPONSORSHIPS

While the Texas Exes offer a comprehensive list of benefits to members, many Chapters have started soliciting local businesses to offer additional benefits to members in their area, for example, working out a deal with a local restaurant to offer 10% off to all Texas Exes members. This helps to increase the benefit of membership at a local level while also helping the Chapter to establish a relationship with a local business that can lead to a sponsorship opportunity. More and more Chapters are looking to sponsors to help underwrite the cost of events. This is a great way to keep the costs down at events while involving local businesses. **Chapters must report any sponsors and the terms of the sponsorship to Texas Exes Staff.**

### *Tips:*

- 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, then 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 Association 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 email 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 created.

### *What we can offer to sponsors:*

- Their company name can be listed on all of the Chapter's email broadcasts with a link to their website along with a sponsor logo
  - Include the number of people/emails this will touch
  - Include how many emails will be sent
- Their name and logo can be printed on any paper mailings to local alumni, if appropriate.
  - Include the number of addresses
- Their name and logo can be printed 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 can be published on the Chapter website with a link to their website.
- Recognition with name and/or logo can be printed in *The Alcalde*, if the chapter is buying an ad for their event.
  - Sent to approximately 93,000 Texas Exes members

- 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:*

- Anything that could jeopardize the Texas Exes non-profit status. If you have a question, contact the Texas Exes staff to help you find an answer.
- Sponsors of food/beverage, auto and energy- let the Texas Exes Staff know if you are interested in securing one of these areas of sponsorships. We may be able to assist you or suggest contacts.
- Any hyperlink should just go to the sponsor's main website and not to a page where there is an endorsement of the sponsor's products by Texas Exes or the Chapter.



## **RAFFLE REQUIREMENTS**

### **Charitable Raffles and Casino/Poker Nights**

The Charitable Raffle Enabling Act (“CREA”), permits "qualified organizations" to hold up to two raffles per calendar year, with certain specified restrictions.

The language of the law is very technical. If your organization is considering holding a raffle you should check the statute to be sure it qualifies, your organization qualifies.

### **Penalties and Enforcement**

An unauthorized raffle is considered gambling under the Texas Penal Code. Conducting such a raffle is a Class A misdemeanor. Participating in an unauthorized raffle is a Class C misdemeanor.

A county attorney, district attorney or the Office of the Attorney General (OAG) may bring an action in state court to stop a violation or potential violation of the Charitable Raffle Enabling Act (CREA).

*\*this information corresponds to Texas state law, check the raffle requirements within your state*

## **INTERNATIONAL CHAPTER CHARTERING**

### **Annual Chapter Chartering**

Each year chapters are required to renew their charter and submit agreements for the new charter year. This allows for existing chapters to update chapter and officer information with Texas Exes. All chartering requirements must be complete for chapters to receive their resources for the new year. All chartering documents can be found and submitted online through the Texas Exes Chapter and Network Leadership Resources page.

### **Annual Requirements**

#### International Non-Chartered Chapter

- International Non-Chartered Chapter Agreement
  - This form is given to the Texas Exes Board of Directors to be approved for the year.
- Officer Submission
  - Non-chartered chapters are required to have at least one key contact to serve the alumni in the area.
  - All board members or key contacts are required to be members of Texas Exes.
  - Each officer is required to submit an information form as well as a conflict of interest form.
- Financial Report
  - This is only required by non-chartered chapters if they take in funds during the charter year. (see above)

#### International Chartered Chapter

- International Chapter Charter Agreement
  - This form is given to the Texas Exes Board of Directors to be approved for the charter.
- Officer Submissions
  - A chartered chapter is required to have 4 individuals serve on the board
  - All board members are required to be members of Texas Exes.
  - Required positions: President, President-Elect, Treasurer, and Membership Chair
  - Each officer is required to submit an information form as well as a conflict of interest form.
- Financial Report
  - 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. All chapters that take in funds, are required to submit a financial report.
- Chapter By-Laws
  - Chapters only need to submit this if they do not have current by-laws on file with Texas Exes.
  - By-laws must be signed by 10 current Texas Exes members. This remains on file and is resubmitted only when amendments have been made. All chartered groups will use this as a starting point.

## **Required Chartered Chapter Positions:**

### **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.
- Oversee the formation of the nominating committee, with president-elect, 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 1<sup>st</sup> 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 1<sup>st</sup>.
- Oversee the formation of the nominating committee, with the current president, 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 payments, 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 Department

## **Membership Chair**

- Represents their Chapter as the Texas Exes “Move To” contact and replies to notifications of alumni moving to their Chapter area.
- Recruits and retains new members by developing programs or processes for pulling in new members and new volunteers.
- Arranges for membership brochures and Texas Exes branded nametags to be available at every event. These can be easily ordered through the association.
- Follows up promptly on communications from anyone willing to help with chapter activities.
- Ensures that every chapter leader is a current member of Texas Exes.
- Promotes the value of membership at events. This can be through a member ticket price, a member-only door prize, etc.
- Ensures that address update forms are available at all events and meetings or directs interested parties to the Texas Exes website. Shares all updates with the Texas Exes.

## **TEXAS EXES SCHOLARSHIP PROGRAM**

### **Texas Exes Chapter Scholarship Program**

Texas Exes Chapter scholarships benefit entering freshmen, transfer students, and/or students continuing their education at UT. Entering freshmen must complete the Texas Exes scholarship application by December 1<sup>st</sup> of the year prior to the fall semester for which they wish to receive an award. The deadline for currently enrolled and transfer students is March 1<sup>st</sup>. Local volunteers of active chapters then review applications and make recommendations for award recipients. The Texas Exes Chapters' volunteer leaders also work year-round to raise the funding for their awards.

Chapters may raise funds to award one-time annual scholarships through a scholarship exchange account or raise funds to endow a scholarship at the minimum levels outlined below. All chapters are encouraged to establish one general endowment that can continue to grow and provide awards to students far into the future.

#### **What is a scholarship exchange account?**

Chapters may establish a scholarship exchange account with the Texas Exes to hold funds which will be awarded directly to students without being invested. Funds submitted to these accounts may only be used for scholarships. The minimum one-time scholarship award is \$500.

#### **What is a scholarship endowment?**

A scholarship endowment is an investment account created with a monetary gift for the specific purpose of awarding scholarships in perpetuity. Generally, the intent is for the endowed asset to be invested with a long-term view and kept intact, and only the income generated by it is distributed annually for scholarship awards. The distribution available from endowments each year is a percentage of the endowment's twelve quarter market value average, as approved by the Board of Directors.

#### **What if our chapter does not have a general scholarship endowment?**

Texas Exes encourages each chapter to work toward the establishment of a general chapter endowment account. General Texas Exes Chapter endowments have the following features and criteria:

- \$15,000 minimum contribution
  - To be eligible for award, the principal contribution goal must have been met by March 31<sup>st</sup> of the prior year.
  - Chapters may fundraise to meet the minimum contributions threshold over a period of up to 5 years.
  - Recognition in Hall of Honor once minimum threshold met.
- Standard name only (i.e., Texas Exes Dallas Chapter Scholarship Fund)
- One general endowment account per chapter.
- Chapter will determine number of awards available, award amounts, and any special recognitions. Chapters may supplement the distribution from their endowment by remitting funds to a scholarship exchange account.
- Chapter can specify if an award can be renewed, and for how many years.

## **What if an individual or group wishes to create a new endowment for a special purpose to support students through our chapter?**

Often, individuals or groups wish to create special endowments in memoriam of others, or to create awards for specific types of students. These endowments are considered Named Chapter Endowments and have the following features and criteria:

- \$50,000 minimum contribution
  - To be eligible for award, the principal contribution goal must have been met by March 31<sup>st</sup> of the prior year.
  - Chapters may fundraise to meet the minimum contribution threshold over a period of up to 5 years.
  - Recognition in Hall of Honor and photo displayed prominently once minimum threshold met.
- Specialized names allowed (i.e., Texas Exes Dallas Chapter Name of Honored Individual Memorial Scholarship Fund)
- Restrictions allowed include:
  - Student classification - entering freshmen, undergraduate or graduate only, etc.
  - Preference for financial need – The Texas Exes will determine an individual’s financial need based on information provided on their application.
  - Required residency – If endowing a chapter scholarship, residency restriction will automatically be specified as the area of that chapter.
  - Renewability – Can this scholarship be renewed? If so, for how many years and should a minimum grade point average be maintained?
  - Major/Area of Study preferences – A donor may select a recipient who is specializing in a particular area of study.
  - Other factors – Other restrictions, such as affinity affiliation, will be determined in final agreement.

### **Scholarship Selection**

Texas Exes uses a standardized application review process for scholarship administration and will issue final approval for all awards. Training information and support for the review and selection process will be made available upon request.

If a chapter does not participate in selection for any given year and eligible candidates exist, the Texas Exes will select recipient(s) according to the eligibility listed in the endowment agreement.

*Due to the sensitive nature of applicant information, any individual or entity representative authorized to review scholarship applications must formally acknowledge an understanding of the Texas Exes Scholarships Confidentiality, Document Security and Conflict of Interest Policy.*

## **Scholarship Contributions from Individuals**

Donations from individuals for chapter scholarships via secure credit card processing are available online; each chapter's site hosted by the Texas Exes includes a feature that allows for online donations.

Donation checks should be made out to Texas Exes and mailed to the following address:

Texas Exes \_\_\_\_\_ Chapter  
P.O. Box 142309  
Austin, TX 78714

## **Scholarship Contributions from Chapters**

Chapters may send funds to add to endowments at any time. Chapters may also send in funds to supplement a scholarship endowment distribution to increase the size of the award for a particular year. If a Chapter or Network sends in a check and the student declines the scholarship and there are no other candidates, the Texas Exes Scholarship Department will contact the Chapter or Network about the funds.

If no eligible recipient can be found for a current year distribution, the funds will be retained in the scholarship endowment. The chapter will not lose the funds, the funds simply remain in the endowment and a new distribution amount will be calculated the following year.

Donation checks should be made out to Texas Exes and mailed to the following address:

Texas Exes \_\_\_\_\_ Chapter  
P.O. Box 142309  
Austin, TX 78714

A remittance form must be included when mailing donation checks to insure they are applied to the intended account.

## **Is there any financial support for chapters raising funds for scholarships for the first time?**

Yes, in an effort to help kick-start fundraising, the Texas Exes provides up to \$500 in a matching gift to each chartered Texas Exes chapter that awards a scholarship to a new UT student. To be eligible for the \$500 matching funds, chapters must be contributing at least \$500 to the scholarship and must be in their first five years of awarding scholarships. Chapter Presidents and Scholarship Chairs will be notified in the first quarter of each calendar year as to whether their chapter will be eligible for matching funds.

For information on establishing a Chapter Scholarship Endowment, please contact:

Daniel Becka

[Daniel.becka@texasexes.org](mailto:Daniel.becka@texasexes.org)

512-840-5662

For information on creating a scholarship exchange account for one-time scholarships, please contact:

[Texasexeschapters@texasexes.org](mailto:Texasexeschapters@texasexes.org)



## **APPENDIX**



## **HELPFUL WEBSITES**

Texas Exes – <https://www.texasexes.org/>

The University of Texas – [www.utexas.edu](http://www.utexas.edu)

Texas Athletics – [www.TexasSports.com](http://www.TexasSports.com)

Information on trademarks and licensing – <https://trademarks.utexas.edu/use-restrictions>

Fast Facts on UT – <https://www.utexas.edu/about/facts-and-figures>

Freshmen Admissions – <http://bealonghorn.utexas.edu/>

Spirit Squad and Hook ‘Em Appearances Request –  
[http://www.texassports.com/sports/2014/2/13/SP\\_0213140626.aspx](http://www.texassports.com/sports/2014/2/13/SP_0213140626.aspx)

## **TEXAS EXES CONTACTS AND IMPORTANT DATES**

### **Key Staff Contacts**

**Courtney Roehling**, Vice President of Engagement  
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**Jane Marie Agnew**, Chapters & Networks Manager  
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**Catherine Flores**, Chapter Coordinator  
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[Catherine.flores@texasexes.org](mailto:Catherine.flores@texasexes.org)

**Shelby Vigil**, Chapters and Networks Coordinator  
512-840-5631  
[shelby.vigil@texasexes.org](mailto:shelby.vigil@texasexes.org)

\*For a complete staff directory, please check the website – <https://www.texasexes.org/about-texas-exes/contact-us/staff-directory>

### **Important Dates**

August 30, 2019	Chapter and Network Leadership Conference
February 2020	Project Worldwide
March 2, 2020	Texas Independence Day
May 15, 2020	Deadline for Scholarship Information to be given to Association
June 1, 2020	Deadline for Chapter Renewal
July 1, 2020	Beginning of Chapter Year

\*For important Texas Exes events, please check the website – <https://www.texasexes.org/>

## TEXAS EXES 2019-2020 CHAPTER ADVISORY BOARD

Christina Woodard, Chapter Advisory Board Chair – Dallas, TX  
[christinawoodard@utexas.edu](mailto:christinawoodard@utexas.edu)

Zoe Wilson, Chapter Board Representative –New York, NY  
[morganzoe0@yahoo.com](mailto:morganzoe0@yahoo.com)

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