



## Chapter Kick Off Call Notes

### AGENDA

**Staff:** Jane Marie Agnew, Chapters and Networks Manager ([janemarie.agnew@texasexes.org](mailto:janemarie.agnew@texasexes.org))

A new year is underway as of July 1; we're excited to work with you! The purpose of this call is to provide you with some guidance and tools to run your network and have a successful year. If you have any questions or comments during the call, feel free to leave them in the chat. We'll also take questions at the end and open it up for discussion at that point.

#### **i. Virtual Chapter and Network Leadership Conference – Thursday, August 18<sup>th</sup> and Friday, August 20<sup>th</sup>**

1. If you haven't already done so, please make sure to register for the conference as soon as possible. We are excited that this year's conference more volunteers from out of state and international chapters can join us! The link will be in the call notes. Many of you had specific topics you wanted to hear about in this call and they will be covered at CNLC in more detail. **Register here:** <https://www.eventbrite.com/e/2021-virtual-chapter-and-network-leadership-conference-cnlc-tickets-158512381801>
2. Agenda
  - a. Find out all that is going on with the Texas Exes and University
  - b. Great opportunity to share ideas and virtually meet your Chapter or Network Advisory Board member and Texas Exes staff face-to-face
  - c. Breakout sessions include:
    - i. Events, Technology, Fundraising, Social Media, HookedIn and more!
    - ii. Following the conference, all chapter and network leaders are invited to attend the virtual happy hour and Trivia game.

#### **2. BASICS**

- a. Quick Overview of chapters and networks around the world.
  - i. All chapters are based on a particular geographic zone, designated by zip codes
  - ii. Networks are affinity based

#### **3. OVERVIEW CHAPTER RESOURCES**

- a. **Chapter Structure**
- b. **Basic Resources**

- i. Access to a dedicated Chapter Advisory Board (CAB) member
  1. CAB are an indispensable resource for us (staff) and networks
  2. CAB is comprised of volunteers and made up of current and former chapter leaders that maintain an active role with the Texas Exes and that draw from their own leadership experience to assist and guide other chapter/network leaders. CAB members are resources available to answer your questions and share their knowledge, so that our leaders can benefit from a shared community of experience.
  3. Each chapter is assigned a member of the Chapter Advisory Board
    - a. they are here to help in any way they can
    - b. They are a resource and can pull from experience to support you

- c. These will be assigned before CNLC and you will be able to meet your NAB member during a special session at our virtual CNLC.
- ii. Listed as official group on [www.TexasExes.org](http://www.TexasExes.org) website
- iii. Registered Trademark logo
- iv. Scholarship Endowment Administration
- v. Event Liability Insurance
  - 1. Chapters are currently covered under Texas Exes' general liability insurance
  - 2. If you need proof of insurance for an event, please let us know and we will get a certificate for you. We will need to know the name and address of the venue and date of event.
- vi. Speakers Bureau list for your use (former Distinguished Alumni, Board and Council Members)
- vii. Event listing on TexasExes.org
  - 1. Free website hosting at [texasexes.org](http://texasexes.org)

To login to the website, use your personal [texasexes.org](http://texasexes.org) sign in and navigate to the chapter's homepage to edit and add events. Training materials can be found online under [Chapter and Network Leadership Resources](#) --> [Chapter Leader Web Manual](#). Please contact Catherine or Jane Marie with any additional questions.

- Other features: (1) Online Event Registration, (2) Event RSVP, (3) Online Event Ticket Sales
- ix. Credit Card processing for (1) donations, (2) event tickets, (3) silent auction, (4) raffles
    - 1. We are able to process online credit card registrations
    - 2. Money is either deposited in the chapters scholarship endowment or a check is sent to the chapter
    - 3. Minus processing fee (if check is sent) 2.75%
  - x. Survey Assistance (survey alumni)
  - xi. Chapter Leader resources offered online including training collateral, how-to manuals, etc. Include the
- c. **Expectations**
- i. Use Texas Exes for communication through email
  - ii. Local sponsorships (if any) must be reported
  - iii. Membership promotion/ the intent to increase membership in local area (i.e., special member-only price at event, member-only door prizes, membership talks, etc.)
  - v. Any design created outside of Texas Exes staff must have prior approval before use
  - vi. Accomplish Social Alumni Engagement Event and Key Priority Event
- d. **[Chapter and Network Leader Resources](#)**
- i. Can download most reports needed & handbook
- e. Other

#### Email Process

- Info about the process can be found here: <https://www.texasexes.org/sites/default/files/2021-07/Chapter%20Email%20Process.pdf>

#### i. Trademarks Policy

- 1. Chapters have permission to use our logo and have their own registered trademark logo
- 2. Permission to use the longhorn silhouette only with prior approval from Trademarks and Licensing (now have online portal where chapter leaders can submit design and get it approved in portal)
  - a. There can be no changes made to the longhorn silhouette – when in doubt, ask
  - b. If having merchandise made w/ longhorn silhouette, it must be produced by an approved licensed vendor and it must receive approval from the Office of Trademarks and Licensing. To obtain approval, use the Trademarks and Licensing portal: <https://portal.trademarks.utexas.edu/>.

3. [Style Guide](#)
4. [Brand Standards and Guidelines](#)

#### ii. Nonprofit Status

1. Texas Exes, as an Association, is its own 501c3 non profit organization. Texas Exes chapters/networks are not automatically granted official 501c3 status under the umbrella of Texas Exes. However, we do allow chapters to use the Association's tax ID letter attached and tax exemption forms when needed. It is usually up to the organization/business the chapter is sharing the tax ID letter with, to accept the forms for any nonprofit purposes.
2. Chapters/networks within the state of Texas are exempt from Texas sales tax, this does not apply to out-of-state chapters. If you would like a copy of the Tax ID letter and tax exemption form please ask us.
3. Due to IRS rules and our designation as a 501(c)3, each chapter/network can only have **two** raffle drawings per year; for chapters outside of Texas, defer to your state's raffle rules.

#### 4. EVENTS (Key Priority events vs. Social Alumni Engagement events)

- a. Have been recording the events that we know of through chapter emails, posting events through our site, and post-event reports
  - i. Around 800 events every year
- b. Important to have a variety of events on your calendar
  - i. not one-size-fits-all event
- c. Two categories of events within the Chapter Program
  - i. Social Alumni Engagement Events
  - ii. Key Priority Events
- d. **"Social Alumni Engagement"** events include:
  - i. Family oriented events
  - ii. Happy Hours/Thirsty Thursdays
  - iii. UT Game Watches
  - iv. Local Sporting Events
  - v. Intramural Leagues
  - vi. Young Alumni Events
- e. **"Key Priority"** events include:
  - i. Student Development Events
    1. Scholarship Fundraising Events
    2. Student Send-Offs
    3. College Fairs, Recruitment Events
  - ii. Community Service
    1. Project Worldwide in February
      - a. Over 50 chapters participated in February 2019
      - b. Can be as small or large as your chapter would like to make it
        - i. Collect canned food, donate blood, pick up trash on the side of the road, etc.)
    2. Community Service year-round
  - iii. Serious Minded Content
    1. Life-long Learning events; Continuing Education
    2. Business Networking events
    3. UT Professor speaking events, University Staff speaking events, Advocacy speaker events
    4. Cultural Events (museums, fine arts performances, etc.)
    5. Speakers Bureau list
- f. For your events, we will send membership brochures and nametags– just ask
- g. Auction Items...Recommendations:

- i. Look in community – restaurants, salons, etc.
  - 1. Look for Texas Exes owned business
  - 2. A great way for businesses to advertise as well
- ii. Can also swap items with other chapters
- iii. Example: Fredericksburg – trade a bed-and-breakfast stay with something unique that another group has

## 5. MEMBERSHIP

- a. Membership funds what we do – it funds the chapter program
  - i. Maintain the database and email marketing tool
  - ii. Staff support for chapters
  - iii. Mailings!! Insurance
  - iv. Funds a lot of our chapter programming; important that everyone promotes it
- b. We don't ask chapters to sell membership, we ask for your support in our membership efforts
  - i. Expectation = membership promotion with the intent to increase membership in local area
- c. Ways to support membership:
  - i. Always have membership brochures on hand at events (if need, contact us and we will send)
  - ii. Have a member and non-member price for events when applicable
  - iii. Have a member-only drawing for a door prize
  - iv. Make sure officers understand the importance of membership and can talk knowledgeably about it
    - 1. We can provide our membership talking points
  - v. All officers must be dues-paying members of the Texas Exes

## 6. ADVOCACY

- a. The advocacy program is aligned with the core purpose of the association—to be an independent voice that champions the university
  - i. UT Advocates are alumni & friends of UT-Austin who opt-in to our weekly newsletter to learn about issues at the state legislature and how they affect UT-Austin
  - ii. Register to be a UT Advocate at [www.texasexes.org/advocate](http://www.texasexes.org/advocate)
  - iii. Our chapter network is a strong platform to gather advocates and help in communicating the importance of higher education to state legislators from their constituents
- b. Building intentionality in your chapter/network
  - i. Invite your state representative and/or senator to your next big event
    - 1. Consider including them as a speaker or presenter
  - ii. Plan an outing to visit your legislator's district office & discuss UT-Austin
    - 1. Texas Exes advocacy department has trainings and material to help you feel comfortable & schedule a meeting
- c. Ways to support advocacy
  - i. Register as a UT Advocate, tell your friends, and keep updated on the issues
  - ii. Volunteer to be an Advocacy Chair within your board
  - iii. Be intentional about advocacy in event planning
  - iv. Participate in the flagship Texas Exes advocacy events
    - 1. Longhorns on the Hill  
Join the Texas Exes for Longhorns on the Hill!  
We're taking our conversations with policymakers online, livestreaming special Longhorn speakers, and encouraging our alumni to let everyone know how important UT is to you, Texas, and the world. This year's online campaign has more accessible advocacy opportunities than ever before. In a critical time for higher education, we're counting on alumni and friends to join us online to protect federal investments in student financial-aid and UT's cutting-edge research funding. Make sure to [register](#) today! To learn more about the history of Longhorns on the Hill and the line-up of activities, read more [here](#).
    - 2. Orange & Maroon Legislative Day – Austin, TX when in session

## Resources Refresher

- **Online Resources Offered by Texas Exes**
  - Unique email address ([XYZChapter@texasexes.org](mailto:XYZChapter@texasexes.org) or [XYZNetwork@texasexes.org](mailto:XYZNetwork@texasexes.org))
  - Microsoft365 suite, including Office and OneDrive for file sharing and storage
  - Volunteer-managed website at [www.texasexes.org](http://www.texasexes.org)
  - Online event management
  - Online survey tools through Microsoft Surveys:
    - Texas Exes create surveys that can be sent out to the chapter/network at the request of a leader.
      - Surveys are commonly used to:
        - *Assess feelings towards specific chapter and network events*
        - *Vote for Board Members*
        - *Gauge alumni response towards completed events*
- **Network Email**
  - Teams Access
  - Sharepoint
- **Microsoft Office Tools**
  - **Logging into the website**
    - Dashboard
    - Editing toolbar
    - Network homepage: locate where to edit a page, and documentation
    - Also point out on website bottom of the page where to direct people to update their contact info and how to do that on your Dashboard
    - Comms preferences on Dashboard
- **Benefits of the Texas Exes Website**
  - **Branding-** We are all Texas Exes
  - **Resources and Support**
    - Event Management
    - Texas Exes Chapters and Networks Staff
    - Reduced admin burden on Board to manage website
  - **Cost**
    - Free for all Chapters and Networks
- **User Portals on Website/ Other Volunteer Tools**
- **On a chapter page, volunteers can make additional support requests and edit their website:**
  - Submit a report about an event.
  - Provide a sign in sheet and meeting minutes.
  - Request refunds for event no-shows and others.
  - Upload a list of recent donors to the chapter/network.
  - Edit the webpage
- **Create Events- Event Tools**
  1. **Texas Exes- Drupal-** Currently ONLY use for free events that link to Eventbrite RSVP. Do not use for ticketed events or to RSVP on the Drupal page
    - Do a quick walkthrough
  2. **Eventbrite-** for ticketed events or free RSVP
    - Do a quick walkthrough
    - Report your events to us, so we can help you get them on the website!

- **Drupal: CREATE An EVENT**
  - Log into the Texas Exes website as yourself.
    - There are two ways you can access your chapter/network page to create an event.
      - Navigate to the Find Your Chapter/Network page and find your Chapter/Network link
      - **Go to your Account Dashboard**  
View your Chapter/Network under My Groups from your Dashboard.  
Then create an event from the chapter/network page.  
\*\*Only create Drupal events for FREE events that DO NOT require an RSVP or link RSVP URL to Eventbrite event\*\*
- **Eventbrite: Create an Event**
- **Eventbrite: Payment**
  - Remitted to Texas Exes; submit a direct deposit to receive funds
  - DO NOT EDIT PAYOUT INFORMATION
- **Email Requests**
  - Who it is sent to
  - Targeted emails
  - E-vites
  - Send surveys to get to know your alumni or request volunteers
  - Email ideas: Send a welcome email to introduce new officers
  - Basics and timeline next slide
- **Email Process**
  - Show timeline
- **E-Vites Examples**
- **Design Requests**
  - Unique designs, E-vites, etc.
  - Merchandise
  - Timeline
- **Social Media**
  - Volunteer maintained Facebook and other social media pages
- **Chapter Network Leader newsletter**
  - These are important!
  - Regular monthly updates on what is coming up
  - Training information/upcoming calls and events

**Who to contact if you have questions or need support- look up Chapter resources, communicate with us and contact Catherine or Jane Marie!**

**Questions?**

*Thank you for joining and we look forward to seeing you at CNLC!*