



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.

This handbook is divided into two major sections: the Summary Section and the Reference Section. The Summary Section will introduce important parts of the Texas Exes, the resources that are available, and some programs. It is designed to give you an overall view of the Texas Exes. The Reference Section goes into more detail on the Texas Exes and the resources available to chapter leaders, as well as introducing more programs available for chapters. If additional information on a topic is available in the Reference Section, there will be a note of the corresponding Reference Section page number.



2017-2018 Chapter Handbook

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TEXAS EXES

Who we are:

The Ex-Student's Association, or commonly known as Texas Exes, is an independent, non-profit, membership-supported organization that exists to connect its members to each other and to the past, present, and future of The University of Texas at Austin.

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:

The Association will be recognized as indispensable to the UT family, connecting and engaging supporters with each other and the University; together we will lead the charge for the University and its mission to be known worldwide as an institution of the first class.

Mission:

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

The Texas Exes promotes and protects The University of Texas at Austin and unites alumni around the world.

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 the world's biggest tailgate party before every home football game), the Texas Exes exists to support The University of Texas and its proud traditions.

Strategic Priorities

Advocacy. We intend to dramatically ramp up our effectiveness at advocating on the University's behalf with any and all governing bodies.

Student Development. We will improve the student experience, from the time they are prospective students to the time they graduate and beyond.

Alumni Engagement. We plan to significantly increase alumni participation: more people involved, more often, and with higher quality programming.

Strategically Partner with The University. We intend to move from good friends to strategic partners with the colleges, schools, and units.

Communicate the Value of UT. Now more than ever, the University needs us to communicate its value to the people of Texas.

Did you know...?

...that in 2016-2017, Texas Exes gave out nearly \$3.7 million dollars in scholarship money, allowing the great academic tradition of UT to continue? 69 Texas Exes chapters contributed roughly \$556,245 to the scholarship fund, giving scholarships to 278 students. This money was raised locally through the efforts of the local chapters, and the money stayed with local students.

...that Texas Exes works to inform legislators and decision makers? The Texas Exes has advocated on behalf of UT Austin almost since its inception. Past successes include cost recovery of research grants, securing funding for capital investment projects and passage of the local election for the medical school. UT Advocates continue to build relationships with elected officials, and when necessary get involved in the process in a positive way through Orange & Maroon Legislative Days, making phone calls, writing letters and visiting with decision makers to help support the university.

...that the Texas Exes strived to enhance the student experience by providing meaningful involvement through Texas Exes Student Membership, Camp Texas, Student Leadership Committee, student and faculty awards, alumni mentoring programs, and leadership development? During the 2016-2017 school year, the Texas Exes recruited dues-paying members and provided programming ranging from etiquette dinner programs to campus-wide spirit rallies. Camp Texas continues to provide incoming freshmen with meaningful interaction with UT faculty and staff, as well as important leadership development.



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 \$2 million each year
- Support for over 130 Chapters and Networks worldwide
- Over 40 Flying Longhorn trips each year
- *Alcalde* magazine stories- keeping alumni connected to their University
- Student programming such as the 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
- Associate Life Membership:
 - Individual: \$1000 (\$50 down and \$25 each month)
 - Joint: \$1500 (\$100 down and \$50 each month)
- Annual Membership:
 - Individual: \$60
 - Joint: \$80
- Recent Grad:
 - Individual: \$48
 - Joint: \$64

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. [Click here](#) to learn more about Chapter resources. You can find requirements/expectations for your chapter [here](#).

The various resources available to Chapters are more fully explained in the Reference Section.

The chapter year runs from July 1st to June 30th, 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 Chapter Department in Austin (required forms vary based on category). ***All forms must be submitted by June 1st.*** Once the forms are received, the charter for each chapter is approved at the Texas Exes Board of Directors meeting in July. **A detailed explanation of the process and the documentation required for renewing a chapter's charter is located in the Reference Section.**

Chapter Overview

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 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
 - Student Recruitment and Development
 - Community Service
 - Serious Minded Content
 - Diverse Social Alumni Engagement

Purpose of Chapters:

- Extend UT beyond the boundaries of the Forty Acres
- Promote membership in the Texas Exes
 - Memberships sustain Chapter activities and are a critical link between members and the University.
- Support UT when athletic teams, 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

Texas Exes Expectations:

- Non-Chartered Chapter Basic Expectations:
 - Use ESA for communication through email
 - At least one Social Alumni or Key Priority Event
 - At least 20 emails on file for alumni in network area

- Membership Promotion
- Local sponsorships must be reported to ESA
- Use sign-in information sheets periodically at social events and send to ESA
- Any design created outside of ESA staff must have prior approval before use
- Chartered Chapter Basic Expectations:
 - All Non-Chartered Chapter * Expectations plus:
 - Active, Up to Date Web Presence
 - At least 1 Social Alumni Engagement Event (not counting game watch)
 - Accomplish 1 Key Priority Event
 - At least 200 alums in geographic area (domestic only)
 - Submit post event reports on Key Priority Events
 - Conduct at least 1 board meeting annually
 - If Scholarships are awarded, minimum total contributed per student \$500
 - Membership promotion in the intent increase membership in local area
- For a complete snapshot of each category including requirements, expectations, benefits, and resources, please click on the appropriate link below.
 - [Chapter*](#) (non-chartered)
 - [Chapter**](#)
 - [Chapter***](#)
 - [Chapter****](#)

Chapter Documentation Requirements:

- For annual documentation requirements and chartering documents, [click here](#).

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.

Chapter Resources

- The resources offered to chapters vary dependent upon category and are based on the prior year’s accomplishments. For more information on the resources available to your chapter, such as emails, paper mailings, staff contacts, etc., click [here](#).

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](#).

This [Event Planning Guide](#) offers tips and ideas for putting on successful events.

More information can be obtained from your Chapter Advisory Board representative listed on pages 18-19 in the Appendix Section.

Texas Exes Scholarship Program

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

Chapter Scholarship Chairs and Presidents will be contacted in the fall to prepare their scholarship committees. Training information and support will be available for the review process.

Chapters may endow a scholarship with a \$15,000 minimum. The amount available for distribution each year is 4.5% of the 12-quarter endowment average. All Texas Exes Chapter scholarship funds are to be managed by the Texas Exes, under the leadership of the Association's Investments Committee. If a chapter is interested in creating an endowed scholarship, please contact Kelly Souza at kelly.souza@texasexes.org.

Chapter scholarship donations via secure credit card processing are set up online; each chapter's site hosted by the Texas Exes features a tool so that chapter supporters may make an online donation. Donation checks should be made out to Texas Exes and mailed to:

Texas Exes
Attn: Scholarships Department
P.O. Box 142309
Austin, TX 78714

Please note: Donations to an endowed scholarship account will only be returned with express written approval of the TESF Board of Directors; donations to a pass through scholarship account for which no eligible recipient can be found will generally be retained in the account for award the following year. Funds not awarded may be returned upon written request of the original donor.

Matching funds equaling \$500 will now only be available to chapters in their first five years of consecutively awarding scholarships. These funds will be used to help chapters award scholarships to recipients. Chapter Presidents and Scholarship Chairs should have received a letter in July informing them of whether or not their chapter will be eligible for the matching funds this year.

For information on Chapter Scholarships, please contact: TexasExesScholarships@texasexes.org. The Scholarships Department will monitor the inbox and respond to questions.

Communications and Publicity

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

Chapter Website

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

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.

Paper mailings

This resource for the 2017-2018 year varies dependent upon chapter category. For your chapter's paper mailing allotment, please reference [this chart](#). The paper mailings available to chapters are in the form of either a postcard or tri-fold invitation. Any specific paper requests will be at the chapters' expense.

Public Relations

Getting coverage in the local news helps both the local Chapter as well as Texas Exes. Having local coverage of your event reaches potential new members in your area, raises awareness of your group, the Association and UT, and highlights the benefits of membership in the local group and in Texas Exes. For help with public relations for your chapter, click here to view the [PR Toolkit](#).

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



REFERENCE SECTION

***Please click on the links to learn about each section**



Membership

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

Resources for Chapters

Learn about all of the resources offered to our Texas Exes Chapters, including those from Austin and our staff, the Chapter Advisory Board, the forms of communications such as emails and paper mailings, and publicity.

- [Basic Resources](#)
- [Category Breakdown](#)

Sponsorships

Find out how to form sponsorships with local businesses in your chapter area and learn about the terms of sponsorships.

For specific guidelines and do's/don'ts of sponsorships, [click here](#).

Event Planning

Read our Tips and Hints for Chapter events, and learn about the event-planning resources offered to you.

Key Priority Events

- Student Development Events
- Community Service Events
- Serious Minded Content

Social Alumni Engagement Events

Texas Exes Chapter Scholarships

Chapter Annual Online Chartering Requirements

Click here for more information on the Chartered Chapter renewal process and required documents.

*For non-chartered chapters, we only require an annual [chapter agreement form](#) and 1 key contact whose membership is up to date.

Ideas for Leadership

Read about Chapter Leadership and Volunteer Succession tips, ideas, and basics. This section includes job descriptions for the chapter board.



APPENDIX

Helpful Websites

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

The University of Texas – www.utexas.edu

Texas Athletics – 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

Athletics Ticket Information – <http://www.texassports.com/sports/tickets/tex-tickets-body.html>

Texas Exes Contacts and Important Dates

Key Staff Contacts

Courtney Roehling, Vice President of Engagement
512-840-5622
courtney@texasexes.org

Jane Marie Agnew, Chapters Manager
512-840-5635
janemarie.agnew@texasexes.org

Venetia Coleman, Chapters Administrator
512-840-5631
venetia.coleman@texasexes.org

Megan Yeager, Chapter Events Coordinator
512-840-5619
megan.yeager@texasexes.org

Brian Rictor, Networks Coordinator
512-840-5616
brian.peterson@texasexes.org

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

Important Dates

September 7, 2018	Chapter and Network Leadership Conference
February 2018	Project Worldwide
March 2, 2018	Texas Independence Day
May 15, 2018	Deadline for Scholarship Information to be given to Association
June 1, 2018	Deadline for Chapter Renewal
July 1, 2018	Beginning of Chapter Year

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

Texas Exes Chapter Advisory Board 2017 – 2018

Jeff Duchin, Chapter Advisory Board Chair –Dallas, TX
jeffery.duchin@umb.com

Ashley Larson – Denver, CO
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Cade Jobe - Austin, TX
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