**New Chapter Leader Conference Call**
Tuesday, August 15, 2017 and Thursday, August 17, 2017
12:00 PM CST

**AGENDA**

**Staff**:

1. **INTRODUCTIONS**
   a. Call instructions
      i. All are muted.  *6 will mute/unmute yourself
   b. Introduce staff on call
      i. Jane Marie Agnew, Chapter Events Coordinator (janemarie.agnew@texasexes.org)
      ii. Megan Yeager, Chapter Administrator (megan.yeager@texasexes.org)

   c. A new chapter year is underway; we're excited to work with you.  A big "Thank You" for submitting all of the required chartering documents and helping us make the process run as smoothly as possible.  The purpose of this call is to provide you with some guidance and tools to run a chapter and have a successful year.  If you have any questions or comments during the call, feel free to jump in by pressing *6 to unmute yourself.  We'll also take questions at the end and open it up for discussion at that point.

      i. Chapter and Network Leadership Conference – Friday, September 1 at the Alumni Center in Austin
         1. If you haven't already done so, please make sure to register for the conference as soon as possible.  Encourage each chapter to send a representative from the group. **Register Here.**
         2. Agenda
            a. Presentation from Wolfgang Career Coaching on leadership and how to make the most of your position in the chapter!
            b. Hear from Texas Exes President, Del Williams and Texas Exes Vice President of Constituent Relations Daniel Becka to find out all that is going on with the Texas Exes and University
            c. Time dedicated to small-group forums for you to share best practices and brainstorm with other volunteers
            d. Great opportunity to share ideas and meet your Chapter Advisory Board member and Texas Exes staff face-to-face
            e. We will host a special reception for the chapter scholarship recipients following lunch at the conference.
               i. Opportunity to meet the students who receive chapter scholarships and get to know them better
            f. Following the conference, all chapter leaders invited to attend the cocktail reception in the main lounge beginning at 4:30pm
               i. This is an invite-only event, but it will be free for our chapter leaders and their dates

  ii. Home Game Chapter Leader Reception
    1. If you are in town for a home game, join the exclusive reception inside the alumni center
      a. Complimentary soft drinks and heavy appetizers
    2. Great opportunity for us to meet and get to know you
    3. Tail Gates open 3 hours before kick-off
      a. The location is still TBD, but we will announce the room within the alumni center closer to the time!

2. **BASICS**
 a. Quick Overview of chapters → around 120 chapters across country
  i. All chapters are based on a particular geographic zone, designated by zip codes
  ii. If you have a question about your geographic zone or want to see a list of included zip codes, please ask
  iii. We can also update the zip codes as needed
 b. Alumni lists
  i. We can share names, grad years, zip codes, and membership status of the individuals in your area
  ii. Due to privacy and security issues, we cannot share lists with contact info (phone, email and address)

3. **OVERVIEW OF CHAPTER RESOURCES**
 a. **Chapter Structure**
  i. Three years ago we rolled out a new chapter structure to better allocate resources to our many groups.  We saw much success with this category structure over the last few years, and we would like to thank you for your open-mindedness and support throughout the first year.  We know more now about our chapters than ever before.  You all have done such a fabulous job reporting events, sending out emails, and diversifying the types of events you offer to your members.  We are so grateful, and we can now brag even more about all of the wonderful things our chapters are doing across the globe!
  ii. During chartering in June, we analyzed all of our records for each chapter to asses which category best reflects each chapter's accomplishments.  We placed each chapter in a category based on your accomplishments throughout the year. Please refer to your welcome email sent out at the beginning of July that announced your chapter's current category. You can find the full category breakdown here: **https://www.texasexes.org/sites/default/files/chapters/Resources/categorybreakdown.pdf**

 b. **Basic Resources**
  i. Access to a dedicated Chapter Advisory Board (CAB) member
    1. Chapter Advisory Board (CAB) indispensable resource for us (staff) and chapters
    2. The Chapter Advisory Board (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 leaders.   Chapter Advisory Board members are resources available to answer your questions and share their knowledge, so that chapter leaders can benefit from our 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. You will be introduced to your CAB member soon, so be looking for that email!
   ii. Listed as official group on **www.TexasExes.org** website
   iii. Registered Trademark Chapter logo
   iv. 25% discount at the University Co-op on items purchased for fundraising purposes (auction items)
   v. Scholarship Endowment Administration
   vi. Event Liability Insurance
      1. Chapters 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.
   vii. Speakers Bureau list for chapters to use (former Distinguished Alumni, Board and Council Members)
   viii. Event listing on TexasExes.org
      1. Free website hosting at **https://www.texasexes.org/chapter**
      2. Our Team has worked very hard to make a website available for each chapter. We have also created a step by step training manual for our leaders to use as they navigate and learn the website features. To receive your chapter's website login, and the training material, please contact **Megan Yeager (megan.yeager@texasexes.org) .**
      3. At Leadership Conference, the Group Promotion through Technology session will showcase some of these online resources.
      4. If you do not currently have a Texas Exes hosted website for your chapter and are interested in one, email the Chapter Dept and we will set that up for you.
   ix. (1) Online Event Registration, (2) Event RSVP, (3) Online Event Ticket Sales
   x. 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%
   xi. Survey Assistance (survey alumni)
   xii. Chapter Leader resources offered online including training collateral, how-to manuals, etc. **https://www.texasexes.org/chapters-networks/chapter-network-leader-resources/forms-documents**

c. **Chapter 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.)
   iv. Use sign-in sheets periodically at events and send in to us→ updated contact info and allows us to track who is attending your events
   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
      1. Each category requires a different number of events to be completed, so please make sure you are familiar with your chapter's expectations.

d. Chapter Leader website (**https://www.texasexes.org/chapters-networks/domestic-chapters**)

   i. Can download most reports needed & chapter leader handbook (new version)
  e. Other
   **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/.**
   **ii. Nonprofit Status**
    1. The Texas Exes is a 501(c)3 status and that status extends to our chapters when donations are made to the chapter
    2. Chapters within the state of Texas are exempt from Texas sales tax, this does not apply to out-of-state chapters
    3. If you need proof of the 501(c)3 status, please ask us
    4. Due to IRS rules and our designation as a 501(c)3, each chapter can only have **two** raffle drawings per year; for chapters outside of Texas, defer to your state's raffle rules
   **iii. Alcalde (online)**
    1. The Alcalde, the official magazine of the Texas Exes, has a website: **http://alcalde.texasexes.org/.**
    2. There is a section dedicated to chapters – this section will store chapter photos as well as the featured chapter stories from past issues of the magazine
    3. You can send the photos directly to the chapter dept.  Please make sure to include the name of the chapter, participants in the photo, if applicable, the location, date, and a short synopsis.

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 1200 events last 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
   iii. Chapter* requirement to accomplish at least 1 Social event or Key Priority Event
  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. Longhorn Saturdays
        4. College Fairs, Recruitment Events
    - ii. Community Service
        1. Project Worldwide in February
            a. 61 chapters participated in February 2016
            b. 72 chapters participated in February 2017
            c. 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.)
- f. For your events, we will send membership brochures and nametags– just ask. We also have some general Texas Exes, Project Worldwide, and Texas Independence Day banner that can be loaned out to Chapters by request.
- 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
        - iv. Insurance
        - v. 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 Chapters Department and 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 knowledgably 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**
        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
        i. Invite your state representative and/or senator to your next big event
            1. Consider including them as a speaker or presenter
        ii. Plan a chapter 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 chapter board
        iii. Be intentional about advocacy in event planning
        iv. Participate in the flagship Texas Exes advocacy events

**QUESTIONS / COMMENTS?**

Please share this information with your board members.

If you would like to have an individual board training call, or training for your Chapter on anything specific please let us know.

We are looking forward to seeing many of you at Leadership Conference and working with you throughout the year!