



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

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

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.

# TEXAS EXES™

## 2013-14 Chapter/Network Handbook

|  |   |
|--|---|
| <u>The Texas Exes</u>                          |   |
| Who We Are .....                               | 4 |
| Mission.....                                   | 4 |
| Did You Know (Some Cool Stuff About Us) .....  | 5 |
| <u>Membership</u>                              |   |
| Why is Membership Important to Texas Exes..... | 6 |
| Membership FAQ's .....                         | 6 |
| <u>Chapters &amp; Networks</u>                 |   |
| What's a Chapter vs. a Network?.....           | 7 |
| Chapter/Network Overview .....                 | 7 |
| Chapter/Network Events and Activities.....     | 8 |
| Scholarships .....                             | 8 |
| Communication and Publicity.....               | 9 |

## REFERENCE SECTION

|   |    |
|---|----|
| <u>Membership</u>                                       |    |
| Pricing Overview .....                                  | 12 |
| Benefits & Services.....                                | 13 |
| Membership Talking Points.....                          | 14 |
| Tips for Reaching out to Non-Members .....              | 14 |
| <u>Resources for Chapters &amp; Networks</u>            |    |
| Texas Exes Resources for Chapters .....                 | 16 |
| Texas Exes Resources for Networks.....                  | 17 |
| Chapter Advisory Board .....                            | 17 |
| Communication.....                                      | 18 |
| Publicity .....   | 19 |
| <u>Sponsorships</u>                                     |    |
| Sponsorships .....                                      | 22 |
| <u>Event Planning</u>                                   |    |
| Tips & Hints for Events .....                           | 24 |
| Raffle Policy.....                                      | 28 |
| <u>Texas Exes Networking Events</u>                     |    |
| 20 Tips for Hosting a Successful Networking Event ..... | 29 |
| Proposed Networking Events.....                         | 30 |
| Texas Exes Career Services .....                        | 31 |
| <u>Texas Exes Chapter Scholarships</u>                  |    |
| Scholarship Fundraising .....                           | 32 |
| <u>Chapter Charter Requirements</u>                     |    |
| Charter Renewal .....                                   | 33 |
| <u>Ideas for Leadership</u>                             |    |
| Volunteers and Leadership Succession .....              | 34 |
| Volunteer Basics .....                                  | 34 |
| Three Steps in the Volunteer Life Cycle .....           | 35 |
| Importance of Delegating .....                          | 35 |
| Tips for Leadership Succession .....                    | 36 |
| Financial Basics .....                                  | 36 |
| Chapter Leadership Job Description.....                 | 37 |

Appendix and Forms

|   |    |
|---|----|
| Helpful Websites .....                            | 42 |
| Charter Agreement .....                           | 43 |
| Sample Officer Report .....                       | 44 |
| Sample Annual Financial Status Report .....       | 45 |
| Sample Auction Donation Letter.....               | 46 |
| Sample Auction Donation Form.....                 | 47 |
| Silent Auction Rules .....                        | 48 |
| Silent Auction Bid Sheet .....                    | 49 |
| Sample Chapter Survey .....                       | 50 |
| Texas Exes Insight into Industries Proposal ..... | 51 |
| Texas Exes Contacts and Important Dates.....      | 52 |
| Chapters for 2013 -14 .....                       | 53 |
| Networks for 2013 – 14 .....                      | 54 |
| Chapter Advisory Board Assignments.....           | 55 |



## 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:

**To unite, inform, and involve alumni and friends  
for the purpose of promoting, protecting, and preserving  
The University of Texas.**

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 2012 alone, Texas Exes gave out nearly \$2 million dollars in scholarship money, allowing the great academic tradition of UT to continue? Texas Exes chapters contributed roughly \$513,000 to the scholarship fund, giving scholarships to 364 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 our legislators? The Texas Exes has advocated on behalf of UT Austin almost since its inception. Past successes include: indirect cost recovery of research grants, totaling around \$70 million a year for the University and amendments to the Top 10% Law that cap the enrollment under this statute to 75% of the freshman class. Advocates continue to make numerous phone calls, visit with legislators during our Orange & Maroon Legislative Days with alumni from Texas A&M University, and send emails and letters urging favorable consideration of legislation.

...that the Texas Exes strives to enhance the student experience by providing meaningful involvement through Texas Exes Student Membership, Camp Texas, Student Leadership Council, student and faculty awards, alumni mentoring programs, and leadership development? During the 2012-13 school year, the Texas Exes recruited dues-paying members and provided programming ranging from job shadowing to dinner programs with alumni 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**

Membership is the lifeblood of the Texas Exes, and as such, it is an important issue for all local chapters. The Association is a separate entity from the University and is self-funded. As a result, the Texas Exes rely on the dues of members to support all its programs, including the chapter program. **Without members, the Texas Exes would not be able to support the chapters and networks.** It is vitally important that chapters and networks, as extensions of the Texas Exes, are always striving to increase membership.

Did you know...

...that a Life Membership can be purchased for \$50 down and less than \$1 per day? It is called Associate Life Membership (until it is fully paid).

...there are a significant number of graduates that would join the Texas Exes if they were only asked or approached about joining?

### **Membership FAQs**

**Q. Why should I become a member of Texas Exes?**

A. Membership in the Texas Exes benefits the alumnus, UT, and the local chapter. Members have access to a wide range of benefits, from our travel program to career services to involvement in the local chapter. Also, membership is the best way to stay connected to UT. Through membership dues, Texas Exes is able to support UT through legislative advocacy and enhancing the student experience. Member dues also support the local chapters – ensuring alumni all over the world can connect with each other. Everyone benefits through membership in the Texas Exes!

**Q. How do I join the Texas Exes?**

A. You can join online at [www.texasexes.org/join](http://www.texasexes.org/join) or by calling 1-800-369-0023.

**Q. Can I join Texas Exes if I am not a graduate of The University of Texas?**

A. Yes. Friends of UT are welcome to join the Texas Exes and support the school they love!

**Q. How many Texas Exes members are there now?**

A. There are currently over 67,000 Life Members, over 3,500 Associate Life Members, and over 35,000 Annual Members.

**Q. How do local chapters benefit from membership?**

A. It is through membership dues that Texas Exes is able to offer support for the local chapters. This support comes in the form of maintaining the alumni database, sending emails for chapters, chapter websites, and mailings. None of this would be possible without dues-paying members.

**More detailed information on Membership is available on Page 13 in the Reference Section.**



## CHAPTERS AND NETWORKS

### What is a Chapter and What is a Network?

Chapters and Networks are local affiliates of the Texas Exes. Chapters and Networks differ in that Chapters require a more fully developed leadership structure and typically award scholarships to local students.

Networks can have a more loosely defined structure with only one person needed as the Key Contact and typically they do not award scholarships. All start-up groups will first become Networks and then grow into Chapters.

**The resources available to Chapters and Networks differ slightly and are more fully explained on Pages 16 & 17 in the Reference Section.**

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 sending the required forms in to the Chapter Office in Austin. *All forms must be completed and returned by June 1<sup>st</sup>.* 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 on Page 33 in the Reference Section.**

### Chapter/Network Overview

Chapters and Networks 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 and networks. Chapters and Networks help increase membership while maintaining a connection between alumni and The University of Texas.

Goals of Chapters and Networks:

- 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 and Networks:

- Extend UT beyond the boundaries of the Forty Acres
- Promote membership in the Texas Exes
  - Memberships sustain Chapter/Network 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:

- Chapter leaders must be members of the Texas Exes.
  - 4 required officers – current president, president-elect, treasurer, membership chair
- Chapters must submit an annual financial status report and charter agreement.
- Chapters should utilize Texas Exes resources for communications with alumni – both paper and email.
- Chapters should use their own Federal Identification Number to obtain own bank account – can obtain online (<https://sa2.www4.irs.gov/modiein/individual/index.jsp>)
- Chapters will uphold Texas Exes bylaws and chapter’s bylaws.
- Chapters will have Texas Exes manage all scholarship funds
- Chapter leaders must respond to inquiries from alumni in their area in a prompt manner.

#### 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/Network Events and Activities**

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

**Page 24 in the Reference Section contains a summary of hints and tips for putting on events and a list of events that Texas Exes Chapters have successfully produced. More information can be obtained from your Chapter Advisory Board representative listed on Page 55 of the Reference 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. All committee members will need a current and accessible UT EID, and will be asked to complete documentation to receive an upgraded EID. All application review is completed online, through UT's admissions database; review requires users to download a VPN connection to the UT servers. Training information and support will be available for the review process.

Chapters may endow a scholarship with a \$7,500 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 Tiffany Gonzales at [Gonzales@alumni.utexas.edu](mailto:Gonzales@alumni.utexas.edu).

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: Tiffany Gonzales  
P.O. Box 7278  
Austin, TX 78713

Please note: Donations to an endowed scholarship account will only be returned with express written approval of the TESH 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 begin to raise scholarship funds and allow the chapter to have this support as they plan fundraising events and activities for the first time. 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:  
Tiffany Gonzales  
[Gonzales@alumni.utexas.edu](mailto:Gonzales@alumni.utexas.edu)  
512-471-8095

### **Communications And Publicity**

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

#### *Chapter Website*

Each Chapter and Network is encouraged to have its own website. The Texas Exes can host a website for the chapter or network; maintenance of the site is up to the Chapter or Network. Any events listed on the chapter's website will automatically be pulled into an event listing online for alumni and friends to see, therefore, all websites must be kept up to date.

### *Emails*

Texas Exes will send out emails to all alumni in your area. This is an efficient, cost-effective way to share information about the Chapter/Network to your constituents. Chapter emails are sent out on Wednesdays, Thursdays, and Fridays of each week.

### *Paper mailings*

Each chartered chapter gets two, two-color paper mailings for the 2013-2014 chapter year – one to members only and one to members and non-members in the area. These are either postcards or tri-folded invitations. Any specific paper requests will be at the chapters' expense. Networks can send out paper mailings, but they will incur the costs associated with the mailing.

### *Public Relations*

Getting coverage in the local news helps both the local Chapter/Network, 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, contact the chapters department to receive the PR Toolkit.

**More detailed information on each of these items is available on Page 19 in the Reference Section.**



## **REFERENCE SECTION**



## MEMBERSHIP

### Pricing Overview

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.

80% of your membership dues are tax deductible.

While the Texas Exes appreciate all of their members, Life Membership is the preferred membership level. 90% of each Life Membership is invested into the Life Membership Fund, and it is this fund that covers the bulk of the operating expenses, including funding for the Chapters Department.

### Membership levels:

#### **Annual Dues:**

- \*Individual - \$60 \*Joint - \$80
- Recent Graduate (up to 5 years past graduation) - \$48 Recent Graduate Joint - \$64
- UT Faculty/Staff - \$51 Joint - \$68

#### **Multi Year Dues:**

- \*Four-year Individual - \$200 \*Joint - \$260

#### **Life Membership:**

- \*Individual - \$1000 \*Joint - \$1,500
- \*Associate Life Membership -  
Individual - \$50 down and \$25 installments every month, with no financing costs  
Joint - \$100 down and \$25 installments every month

#### **Texas Exes Student Membership:**

- \$25 annually
- Student Life Member- \$50 year or pay \$200 for all four years

*\*discount offered to Senior Citizens*

## **Membership Benefits & Services**

*(This list is constantly being updated, so for the most up-to-date information regarding member benefits and services, visit [www.TexasExes.org/join](http://www.TexasExes.org/join))*

- Lifetime Permanent Forwarding Email Address
- Update Your Address Online
- *The Alcalde* Magazine
- Texas Exes Tailgate at the Alumni Center
- Group Travel (Flying Longhorns program)
- Discounts on UT Continuing Education Classes
- UT Library Use
- Discounts on Performing Arts Center Performances
- Access to UT Recreational Sports Program
- Texas Monthly Discounted Subscription
- Horns Illustrated Discounted Subscription
- Short-Term Medical Insurance
- Liberty Mutual Homeowners, Auto, and Renters Insurance Discounts
- Alumni Career Services
- Bank of America MasterCard
- Personal Wines
- Online Access to UT Libraries
- Austin Business Journal Discounted Subscription
- Members qualify for University Federal Credit Union Services
- Discounted Princeton Review Courses
- Hyatt Hotels and Resort Savings

## **Membership Talking Points**

*Tailor your membership talk to suit your audience:*

### **Sports Event – ex: Game Watching Party**

Texas Exes is a membership-based organization that supports The University of Texas. We offer Texas Exes members benefits for every Longhorn fan – everything from buses to the OU game to travel packages to the major bowl games to away game tailgate parties. We are the group to travel with to the next big game. When you are in Austin, the Alumni Center is the place to be before the home football games and it is an exclusive benefit for Texas Exes members. Locally, join us for game watching parties (ADD BENEFITS SPECIFIC TO THE LOCAL CHAPTER).

### **Networking Event – ex: Texas Exes Business Network Function**

Texas Exes is a membership-based organization that supports The University of Texas. Texas Exes offers career support for all alumni of UT. Career Services provide members with resources, tools, and services in directing their ongoing career growth and development. Many local Chapters offer Texas Exes Business Network events. (ADD BENEFITS SPECIFIC TO THE LOCAL CHAPTER)

### **Social Event – ex: Thirsty Thursday**

Texas Exes is a membership-based organization that supports The University of Texas. No matter where you are in the world, there are Texas Exes. Local chapters help bring a little of the Forty Acres to you, no matter how far from Austin you might be! The great events provided by the Chapter for local alumni wouldn't be possible without the membership dues. (ADD BENEFITS SPECIFIC TO THE LOCAL CHAPTER)

### **Scholarship Event**

Texas Exes is a membership-based organization that supports The University of Texas. One of the most important things we do is provide scholarships to UT students. In the 2012-13 school year, roughly \$2 million was given in scholarships. The scholarship program couldn't continue to exist without the support of dues-paying members. (ADD BENEFITS SPECIFIC TO THE LOCAL CHAPTER)

## **Tips for reaching out to nonmembers**

Increasing Texas Exes membership benefits local Chapters – membership provides funding for local chapter program and increased membership leads to new volunteers for the local Chapter and increased Chapter participation. If non-members feel a part of the local Chapter, they are more likely to join! Here are some tips for reaching out to non-members in your area and making them feel welcome at your events:

- Utilize your Chapter website to showcase your events – both upcoming and past events. Non-members have access to the Chapter websites, so this is a great tool for bragging about the success of a recent event and showing how much fun was had. Also, this is a great tool for showcasing upcoming events – if they don't know it is happening, then they don't know to attend!
- Ask non-members to sign in at events with their address information. While Texas Exes maintains data for both members and non-members, it is more difficult to get current information for non-members. If we don't know where they are, then we can't communicate with them! Have them fill out their email address, at the least, and then send that information to Texas Exes so we can update our database. This way they will be on the email distribution for the next Chapter event!

- Follow up with non-members after an event. This can be done through an email telling them how happy you are they attended and informing them of the next chapter event. Include a link to the chapter website so that they can stay current on Chapter events and a link to Texas Exes so that they can join.
- Always have membership brochures on display. Be prepared to answer membership questions.
  - See the membership benefits section and the membership FAQ section
- When you make announcements at your events, be sure to plug membership. Tailor this to suit the type of event and to suit your local Chapter. You know best what is going to motivate non-members in your area to join.
  - See the membership talking points section for some ideas on selling membership
- Have a discounted price for members when possible. When this is not possible, incorporate another way to recognize members. Some ideas:
  - Have a drawing that only members can enter. This does not need to be something elaborate – a t-shirt would be enough.

The idea is to reward membership, not to alienate non-members. We want to show non-members the value in joining without making them feel left out.



## **RESOURCES FOR CHAPTERS AND NETWORKS**

The entire staff of the Texas Exes is here as a resource for Chapters and Networks. Your primary contacts are the Director of Engagement, Chapter Coordinator, Scholarships Coordinator, and the Chapter Administrator.

Courtney Ratliff  
Director of Engagement  
512/475-9352 or 800/594-3937  
[ratliff@alumni.utexas.edu](mailto:ratliff@alumni.utexas.edu)

### **Chapter Resources from Austin**

- A Chartered Chapter for the 2013-2014 chapter year receives two mailings during the year – one to all members and one to both members and non-members living in your Chapter's area.
- Weekly email broadcasts can be sent to all alumni in your Chapter's area - both members and non-members.
- Registered Trademark Chapter logo
- Scholarship Endowment Administration
- Texas Exes will provide \$500 to chartered chapters in their first five years of consecutively awarding scholarships to use towards scholarships for local students new to UT Austin in the 2014-15 academic year.
- Texas Exes will process the Chapter's credit card purchases, less processing fees. The resulting funds can be deposited into the Chapter's Association-managed scholarship fund or a check can be sent to the Chapter's representative to help with local expenses.
- On-line event registration is available. This tool will process credit card charges for ticket purchases and generate participant rosters. Again, resulting funds can be deposited into the Chapter's Association-managed scholarship fund or a check can be sent to the Chapter's representative to help with local expenses.
- At-the-door, on-line credit card processing for event tickets, plus auction item and merchandise sales is available at Chapter events. To use this, a Chapter volunteer must provide a laptop with internet capability, and the venue will need wireless internet access or a phone line to use for this purpose.
- On-line credit card donations to the Chapter's scholarship fund(s) can also be set up. This link will be posted on the Chapter's website and can be sent out in email broadcasts, as well.
- A Chapter website is hosted for every interested chartered chapter ([www.TexasExes.org/chaptername](http://www.TexasExes.org/chaptername)). Please contact Texas Exes if your chapter needs to develop a site. The Chapter's leadership will be able to make edits. Any events listed on the chapter's website will automatically be pulled into an event listing online for alumni to see.
- Listing as a Texas Exes Chapter on the TexasExes.org website, with link to the network's website and contacts.
- The Texas Exes logo can be used with prior approval.
- Chapters are covered under the Texas Exes liability insurance. If you need proof of insurance for an event, please request it from Texas Exes staff.



- Chapter leader resources offered online including training collateral, how-to manuals etc.
- Chapter Advisory Board member assigned to groups for additional volunteer resource
- Access to Chapter Leadership Group on LinkedIn
- Survey Assistance
- All presidents of chartered Texas Exes Chapters are automatically members of the Texas Exes Council.

### **Network Resources from Austin**

- Weekly email broadcasts can be sent to all alumni in your Network's area – both members and non-members.
- Registered Trademark Network Logo
- The Texas Exes will process the Network's credit card purchases, less processing fees. The resulting funds will be sent to the Network's representative to help with local expenses.
- On-line event registration is available. This tool will process credit card charges for ticket purchases and generate participant rosters. Again, the resulting funds will be sent to the Network's representative to help with local expenses.
- At-the-door, on-line credit card processing for event tickets, plus auction item and merchandise sales is available at Chapter events. To use this, a Network volunteer must provide a laptop with internet capability, and the venue will need wireless internet access or a phone line to use for this purpose.
- A website will be hosted for every interested Network ([www.TexasExes.org/networkname](http://www.TexasExes.org/networkname)). Please contact Texas Exes staff if your network needs to develop a site. The Network's designated webmaster will be able to make edits. Any events listed on the chapter's website will automatically be pulled into an event listing online for alumni to see.
- A listing as a Texas Exes Network with a link to the Network's website and contacts will be published on the TexasExes.org website.
- The Texas Exes logo can be used with prior approval.
- Networks are covered under the Texas Exes liability insurance. If you need proof of insurance for an event, please request it from Texas Exes staff.
- Chapter leader resources offered online including training collateral, how-to manuals etc.
- Chapter Advisory Board member assigned to groups for additional volunteer resource
- Access to Chapter Leadership Group on LinkedIn
- Survey Assistance

### **Chapter Advisory Board**

The Chapter Advisory Board is made up of current and former Chapter leaders that maintain an active role with the Texas Exes and who draw from their own leadership experience to assist and guide other Chapter leaders. Each Chapter Advisory Board member is assigned a grouping of chapters to work with and serves as another resource available to Chapter leaders. Additionally, several Chapter Advisory Board members have been designated as having an area of specialty that may be called upon by all Chapters as needed; for example, sponsorships and issues affecting out-of-state Chapters. Chapter Advisory Board members are resources available to answer your questions and to share their knowledge so that Chapter leaders can benefit from our shared community of experience.

## **Chapter Advisory Board Members:**

Tom Brayshaw – Fredericksburg, TX  
Mike Carrizales – Chair-Corpus Christi, TX  
Nate Carty – New York, NY  
Jeff Duchin – Dallas, TX  
Maria Garate- Dallas, TX  
Troy Glander – San Antonio, TX  
Steve Gragg – Phoenix, AZ  
Richard Heller – Austin, TX  
Kenny Liao – San Francisco, CA  
Erin Naman- Houston, TX  
Mike Perez – Missouri City, TX  
Casey Smith, Houston, TX  
David Squire – Austin, TX  
Zoe Wilson- New York, NY

**A list of Chapter Advisory Board members and their Chapter assignments is located on Page 55 in the Appendix.**

## **Communication**

### **Chapter/Network Information on Communication/Web/Logos**

- Paper Mailings
  - For the 2013-2014 chapter year, each chartered chapter will receive two free mailings– one to members only and one to members and non-members.
    - 2-color only, postcards or tri-folded mailers
  - Any specific paper requests will be incurred at the Chapters' expense.
  - All paper mailings will include the Chapter's logo.
  - Requesting paper mailings:
    - The content for the paper mailings should be emailed to Texas Exes staff.
    - It takes 3 to 5 business days for the mailing to hit the mail from the time it is sent to the printer. Please allow an additional 3 business days for the designing of the invitation.
    - The request should specify if you want the mailing to go to members only or members and non-members.
    - A proof will be emailed to you to check before it is sent to the printer.
    - Invitations need to hit local mailboxes at a minimum of 3 weeks prior to the event. If the invitation is not requested in enough time for this to happen, then the Association reserves the right to deny the invitation request.
- Email Communications
  - Texas Exes will send out emails for each Chapter and Network.
    - Emails per Chapter/Network will be limited to one per week.
      - Chapter emails go out on Wednesdays, Thursdays, and Fridays.
    - Emails go to all alumni in the area – both members and non-members.

- Emails can be targeted to specific groups.
      - Example: An email can be sent to alumni in the area that graduated in a certain year range.
    - Requesting emails:
      - The email content should be emailed to Texas Exes staff.
      - A proof will be sent to you before the email is sent.
      - Please allow 2 business days for an email to be sent.
      - Chapter emails are sent out on Wednesdays, Thursdays, and Fridays only.
- Chapter Listservs
  - The Association requests that Chapters/Networks use Texas Exes resources for all email announcements for official Chapter/Network events.
  - The database of official emails maintained by Texas Exes will be the most up-to-date.
- Website Hosting
  - A Chapter/Network website is one of the best ways to communicate with alumni in your area.
    - Tip: It is very important to keep your website as up-to-date as possible.
  - The Texas Exes will host a Chapter/Network website for all interested Chapters/Networks at [www.TexasExes.org](http://www.TexasExes.org).
    - The Chapter/Network will be responsible for maintaining all updates.
- Logo Usage Guidelines
  - As an affiliate of the Texas Exes, Chapters and Networks are allowed and encouraged to use the Texas Exes brand. You may also use the Longhorn silhouette logo given prior approval.
  - There can be no changes to the Longhorn silhouette logo.
    - For example: The color cannot be changed or words written over the logo.
    - See the policy on the use of trademarked images online at <http://www.texasexes.org/userdocs/trademarkpolicy.pdf>.
  - Texas Exes will provide a registered trademark logo for the group to use.
    - Example:



## Publicity

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

### *Chapter Website*

Each Chapter and Network is encouraged to have its own website. The Texas Exes can host your website; maintenance of the site is up to the Chapter or Network. The more the site is developed and updated, the more interesting it will be to alumni in the area. Use your website as a tool to promote the group as a whole and your upcoming events. **Any events listed on the chapter's website will automatically be pulled into an event listing online for alumni to see.**

Key elements to include in your website:

- Board/leadership contact information
- The mission of the Chapter/Network
- Current event information
- Summaries of recent events
- Event calendar
- Photos of past events
- Link to TexasExes.org and information about membership and benefits
- Scholarship information
- Involvement opportunities within the Chapter/Network

### *Emails*

Texas Exes will send out emails to all alumni in your area, both members and non-members. This is an efficient, cost-effective way to share information about the Chapter/Network to your constituents. Make sure to send the email out in a timely manner and include all pertinent information, including who to contact with RSVPs and questions. It is important not to flood the email boxes of your alumni, so put thought into how often emails are being sent. Emails are best for regular announcements, reminders and updates.

Email tips:

- Chapter and Network emails are sent out on Wednesdays, Thursdays, and Fridays of each week.
- Send the complete content to Texas Exes staff.
- If more than one person is contributing to the email, have everyone proof it and give their okay *before* you send it to our staff. Only one person in the Chapter/Network will be sent the proof. Keep in mind that having more than one person look at the proof can delay the process.
- If you want a reminder email sent out, tell staff the day you want the reminder sent.
- Send the email content to our staff at least 2 business days before you want the email sent.
- Create an enticing subject line that compels the reader to open the message.
- If the email contains several items, separate them into clear headings.
- 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.

### *Paper Mailings*

For the 2013-2014 chapter year, each chartered Chapter gets two, 2-color paper mailings per year – one to members only and one to members and non-members in the area. Networks can send out paper mailings, but they will incur the costs associated with the mailing. Texas Exes has negotiated a very good rate with a local printer, so we would encourage you to still go through us for any mailings, and we will then bill the Chapter/Network. These mailings are sent first-class and are limited to a 2-color postcard or tri-fold flier. Paper mailings are best for big events; make sure to mail them out in plenty of time. They must be received in mail boxes three weeks prior to the event in order for the Chapter to use the mailing allocation provided.

Paper mailing tips:

- Send the complete content to Texas Exes staff.
- A proof will be emailed to the person requesting the mailing.

- It takes 3 to 5 business days for the mailing to leave Austin from the time it is sent to the printer. Please allow an additional 3 business days for the designing of the invitation.
- When submitting a request, indicate whether the mailing is to go to members only or members and non-members.
- Remember that less is more. Provide information as simply, clearly and as concise as possible. Too much information will lose the readers' attention.
- Make sure to include all pertinent information on the mailing: date, location, time, and directions, contact person, etc.
- Send out mailings with plenty of time before an event. The ideal lead time is 4 to 6 weeks' notice.

### *Public Relations*

Getting coverage in the local news helps both the local Chapter/Network, 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. This is achieved through the public relations efforts at the local level. The goal of good PR is to connect with the community by building positive relationships and promoting a two-way communication. We would encourage all Chapters to appoint a Communications Chair and to contact the Texas Exes staff for a PR Toolkit.

How to get your chapter in the news:

- Look for a "hook" or a unique angle in a story. Reporters want to write stories about things that are one-of-a-kind or out-of-the-ordinary.
- Don't flood a reporter with reams of paper each week. Send items that are timely, interesting and newsworthy to the general public.
- Plan ahead. Send your news release to the media one to two weeks prior to your event.
- Telephone the day before the event as a gentle reminder. Ask for the assignment editor. Don't ask them to commit (they cannot), but just say you called to remind them and if they can cover your event, then you would be most appreciative.
- Respect a reporter's deadline. If he needs it by Monday, get it to him by Monday.
- Make sure your news releases are brief and concise – say what needs to be said, usually in two to five paragraphs.
- Double-check your facts. It does no good if the media comes to your event on the wrong day or at the wrong time.
- Always be honest with a reporter. Lost credibility cannot be regained.
- Remember that every good reporter wants to get a story before the competition. To show that you're being fair with the timing of your news releases, distribute to all at the same time. Document when the releases were distributed.
- Tell a reporter when you believe he or she has done a good job on a story. Write a thank you note for coverage you received. Copy your letter to the general manager or the publisher.
- If your event is not "covered," attempt to gain post-event coverage. Modify your original release to summarize the activity. Again, specify who, what, when, where and why. Photos with captions and quotes by those involved help make the release interesting and increase its chance of being published. If you send 35mm photos, identify the Chapter, date, student/teacher names and grades on the back of the pictures in case they are separated from the release. Use either a post-it note or a marker made especially for photographs. Sometimes the photo will be published but the release will not, so be sure that the caption can "stand alone."



## 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/Networks must report any sponsors and the terms of the sponsorship to Texas Exes Staff.**

### Sponsorships

#### *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.
  - 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:*

- Sponsor logos will not be on the email broadcasts (name listing only).
- 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.



## TIPS AND HINTS FOR EVENTS

- Tips for events
  - Host a variety of events that appeal to a wide range of members – offer alumni an experience they can't get elsewhere
  - Provide events that will offer fellowship, personal enrichment and new opportunities to utilize their UT connection
  - Take advantage of what is unique about your city or community
  - Keep your event cost reasonable, especially if trying to reach younger alumni
  - Keep your program as brief as possible
    - An hour-long program with your guest speaker or other activities plus an hour for dinner is generally long enough. Don't try to accomplish everything in one event! Your attendees will become restless with a long, drawn out event.
  - Silent auctions generally work better than live auctions
    - If you do decide to have a live auction, then limit the number of items to 3 or 4.
  - You can never have enough help!
    - Make sure to have a committee of volunteers to help with the planning and promotion – and make sure to have enough volunteers on hand at the event
  - Designate Chapter volunteers to serve as greeters at the event – this makes everyone attending feel welcomed
  
- Guidelines
  - Only use insured, licensed and bonded bartenders to serve alcohol during Chapter events.
  - Chapters are covered under the Texas Exes liability insurance. If you need proof of insurance for an event, please request it through the Association.
  - Offer a discounted ticket price to Texas Exes members or some other benefit to members.
  - For tax deductibility reasons, the fair market value of the ticket must be stated on the invitation.
    - The fair market value is what the individual would normally pay for the food, goods, and/or services.
    - Example: If a restaurant would charge \$25 normally for the meal being served, then \$25 is the fair market value.
    - This amount does not necessarily have a direct relationship to the amount the Chapter is paying for the food, goods and/or services being provided.
  
- How we can help
  - Nametags
    - Texas Exes will send out nametags for groups to use at events.
    - Please contact Texas Exes to have nametags mailed to you.
  - Banners
    - Groups can order banners through the Texas Exes.



- A banner request should be sent to the Chapters Department.
    - The Chapter/Network is responsible for the cost.
      - A standard 2 x 6 banner runs approximately \$60.
  - Event decorations
    - Event decorations can be purchased at the Coop
      - Contact:
        - Brian Jewell
        - [bjewell@universitycoop.com](mailto:bjewell@universitycoop.com)
        - 512/476-7211 of 800/255-1896
- Auction Items
  - All autographed items must be purchased through Fanatics – the official team store or the University Coop
  - Items available through the Texas Exes:
    - Flag flown over the Texas Capitol - \$16
  - Other suggestions
    - Personal Wines – personalize the label for your event- visit [TexasExes.org](http://TexasExes.org) for more information.
    - Solicit local donors
      - Dinner at a local restaurant
      - Weekend stays at a resort
      - Services such as car wash, house cleaning, dental cleaning, etc.
- Speakers
  - 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.
    - <http://www.texassports.com/compliance/coach-appearances.html>
    - You will need to fill out the form and return to the Athletics Department.
    - In 2008, the Athletics Department instituted a new policy regarding football coaches. *Football coaches are no longer available as speakers for events.*
  - Contact The Texas Exes Staff to view the Texas Exes Speakers Bureau for speakers/topics that may be available for your area.
- Suggestions for events
  - Think of these Categories:
    - Social Alumni Engagement
    - Key Priority Events
      - Community Service
      - Student Development
      - Serious Minded Content
  - Student Recruitment/Development- *Key Priority Event*
    - 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

- Community Service Events- *Key Priority Event*
  - Participate in Texas Exes Care about The Project in February
    - [www.texasexes.org/care](http://www.texasexes.org/care)
  - Participate in a Red Cross Blood Drive
  - Work with Habitat for Humanity
    - Some areas have competitions that pit schools against each other – this would be a great way to interact with other alumni chapters in the Big 12 Conference
  - Participate in a community clean-up day
    - Example: Get a group together to clean up the Guadalupe River – it is a good cause, and you are tubing!
  - Participate in a local walk or run to support charity
    - Get a group together to run/walk and raise money for a good cause
    - Example: The Alaska Chapter hosts a dinner and reception for the Texas4000 every year that is a big success.
      - Other Chapters along the route can host similar events depending on their needs.
  
- Serious Minded/ Cultural Events- *Key Priority Event*
  - 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
  - Have an educational speaker at your events
  - Host a Texas Exes Business Networking Event (TEBN)
  
- Social Events- *Social Alumni Engagement Event*
  - 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
    - Check your local library to see if they do regular summer readings/puppet or magic shows for kids and designate a Texas Exes day at the library.
  - Happy Hours with the alumni chapter of an upcoming sports opponent.
    - Schedule it the week of the game
  - Tailgate event to kick off the football season
    - San Antonio Chapter does this annually to raise money for their scholarship fund.

- Bring in “football experts” to talk to the crowd
  - Have a band end the event
- If there is a professional team in your area, then buy a block of tickets and host 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.
  - Meet before or after the game at a local bar or restaurant
- Create a softball team or other athletic team made up of Chapter members
- Plan a bus trip to a game
  - Especially fun for out of state Chapters if the football, basketball or baseball team is playing nearby
  - The Kansas City Chapter did this for the Kansas State game
- 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.
- 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
    - San Antonio Chapter does the “12 Bars of Christmas” – they sell wristbands for a nominal fee and in turn bars offer participants drink specials
- Happy Hours
  - 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 tasting or a winery tour
  - Can be done in someone’s home or at a winery or restaurant
  - Great success amongst several Chapters
  - Can also be a brewery tour

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

## **Raffle Policy**

The following rules apply to Chapters within the state of Texas, as determined by Texas state law. Chapters outside of Texas will need to consult their state's rules governing raffles held by charitable organizations before proceeding with a raffle.

- A Chapter may not have more than two raffles in any given calendar year. The calendar year begins January 1<sup>st</sup> and ends December 31<sup>st</sup>, as defined by the State of Texas.
- A Chapter can only sell tickets to one raffle at a time. If the Chapter is offering two raffles, then they cannot sell the two tickets during the same time period.
- The Chapter must set a date in advance on when the prize will awarded. If the Chapter becomes unable to award the prize on that date, then they must set another date to award the prize within 30 days of the original date. If the Chapter fails to do so, then they must refund or offer to refund the amount paid by each person who purchased a raffle ticket.
- All proceeds from the sale of tickets for a raffle must be used for the charitable purposes of the organization.
- The following restrictions are in place for the promotion of the raffle and ticket sales:
  - The Chapter cannot, through the use of paid advertising, promote a raffle through a medium of mass communication, including television, radio or newspaper.
  - The Chapter cannot promote or advertise a raffle statewide.
  - The Chapter cannot sell or offer to sell raffle tickets statewide.
- The following information must be printed on each raffle ticket sold or offered for sale (this applies to raffle tickets sold in advance of an event):
  - The name of the Chapter conducting the raffle
  - The address of the Chapter or of a named officer of the Chapter
  - The ticket price
  - A general description of each prize having a value of more than \$100 to be awarded in the raffle
  - The date on which the raffle prize or prizes will be awarded
- A raffle prize may not be money.

This is only a snapshot of the rules governing raffles conducted by charitable organizations within the state of Texas. If you have specific questions, please contact the Texas Exes Staff.



## **TEXAS EXES NETWORKING EVENTS**

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.

### **20 Tips for Hosting a Successful Networking Event**

- Clearly define the goals and agenda of the event before advertising it
- Attract alumni who have never attended your events (or haven't in decades)
- Schedule a local venue that is enticing, fun, and sophisticated (not all alumni like bars or office buildings)
- Negotiate with venue and catering for special rates and food
- Determine price point after securing venue, keeping registration fee low (the magic number seems to be somewhere between \$10 and \$20)
- Open bars are great, but break the bank! (try a cash bar)
- Free events result in a 50-75% no show rate, so charging a fee ensures a crowd
- Confirm local alumni leaders or industry representatives 2-3 months out
- Spotlighting leaders and representatives on all invitations and emails will spark interest
- Provide attendees with biographies on leaders and representatives
- Categorize bios by industry so attendees can determine how to network
- Bios should detail the representative's degree and year, current job title, employer name and previous work history
- Pre-printed nametags for all registrants and hand-written ones at the door are a KEY to successful networking
- Buy-in and support from multiple Chapter leaders is critical in identifying industry reps and local leaders
- Chapter leader contacts are diverse and impressive, creating phenomenal representatives for the event
- Keep the presentation portion of the program short so that attendees have plenty of time to network
- An open networking format allows attendees the flexibility to visit with multiple reps and industries and other attendees (and chapter organizers keep their sanity!)
- Begin planning 3-4 months in advance and open online registration 6-8 weeks out
- Encourage attendees to bring their own personal business cards or supply blank cards for those who forget theirs
- Outline the agenda on invitation and event program – people like to know what to expect

## **Proposed Networking Events:**

- Networking Happy Hour
  - Similar to a traditional happy hour but promote the event as a chance to network with fellow alumni
  - Have nametags available and suggest they write their industry or occupation in addition to their name
  - Encourage everyone to bring their business cards
  - Host the event at an appropriate venue – choose a bar that lends itself to conversation and mingling
  
- Insight Into Industries
  - Host an event where 4 to 5 industries are represented – have alumni representatives from each industry attend to serve as industry reps
  - Industry reps are not required to speak or address the crowd – they are there to answer questions and talk to those specifically interested in their industry
  - The purpose of this event is threefold:
    - To connect alumni in the Chapter area with fellow alumni that represents their career field or industry of interest
    - To allow alumni to network with each other
    - To give alumni the inside track of how a particular industry works
  - For more information see the Insight Into Industries Proposal in the Appendix on page 54.
  
- Networking Lunches or Breakfasts
  - Advertise regularly scheduled lunches or breakfasts as a chance to network with other alumni
  - This can have a speaker or not – either way, it is an opportunity for alumni to interact with each other for the purpose of networking
  - Have attendees stand up to introduce themselves and give their elevator pitch
  
- Speaker Series
  - Bring in speakers throughout the year to address the group on timely topics
  - Make sure to vary the topics by event.
    - For example, have someone speak on finance one month and then someone speak on the arts the next month
  - A panel of speakers on a specific topic

## **Texas Exes Career Services**

The Texas Exes offer a full service Career Services Office to alumni. This is a great benefit to members and can be utilized no matter where you live. Jennifer Duncan is the Director of Career Services, and she can be reached via email at [Duncan@alumni.utexas.edu](mailto:Duncan@alumni.utexas.edu) and via phone at 512/232-1847. The following is just a sampling of the benefits offered through the Career Services Office. For a full listing, please see the website - <http://www.texasexes.org/career>.

- Hire ‘Em Horns – Texas Exes resume and job listing site; alumni may post jobs for free on behalf of their employer
- Teleclasses – monthly, topic-driving career classes
- Consultations – can be in person or via phone; can be individual or in a group setting
- Assessments
- Career Network – career network of 600+ alumni career contacts who have agreed to do information sessions
- Virtual Career Center – online job listings and resources



## SCHOLARSHIPS FUNDRAISING

### Scholarship Fundraising

Helpful tips (beyond auctions and raffles!)

- Publicize your scholarship fund on your website and on your email broadcasts. Let your alumni know that they can contribute year round. This also touches people who don't actively participate in Chapter events.
- On your website, consider profiling your most current scholarship winners. This adds a human interest element and personalizes the scholarship fund.
- Make sure that donors know they can participate through the employers matching gift program.
- Add an extra few dollars to the cost of attending an event with proceeds going to the scholarship fund.
- Have a wine and cheese tasting, for example, with proceeds going to the scholarship fund. If vendors see this as an opportunity to educate a new audience about their products, then they may be willing to work with a Chapter on such an event.
- At game watches, collect a dollar or two from anyone who wants to participate each quarter of the game. Those that contribute are entered into a drawing at the end of each quarter. All proceeds go to the scholarship fund. Prizes are small items – t-shirts, hats, etc., that can either be purchased cheaply by the Chapter or items they get donated.
- Hold a "silent" meal auction in which members of the Chapter donate menus that they would prepare. Menus are auctioned off to the highest bidder, and the cooks are not revealed until the menu is sold. This leaves suspense as to who will be cooking for whom. The date of the meal is then arranged by the host and the winner. This is also a great way for members to get to know each other.

\*Note about raffles: Chapters can only have two raffles per year but can have an unlimited number of door prizes.





## CHAPTER CHARTER REQUIREMENTS

### Charter Renewal

Chapter charters must be renewed every year. The chapter year runs from July 1<sup>st</sup> to June 30<sup>th</sup>. *All forms must be completed and returned by June 1<sup>st</sup>*. Chartered Chapters are approved at the Texas Exes Board of Directors meeting in July.

Documents needed:

- Charter Agreement
  - This form allows the group to apply to the Texas Exes' Board of Directors for a charter.
- Officer Report
  - A minimum of four individuals in the required positions must maintain current Texas Exes membership.
    - Required positions – current president, president-elect, treasurer, and membership chair
  - In order to diversity fiduciary responsibilities, the treasurer and president cannot be the same person.
- Financial Statement
  - 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.
- Chapter Bylaws
  - These must be signed by 10 current Texas Exes members. This remains on file and is resubmitted only when amendments have been made, but all groups to be chartered need to use this document as a starting point; it establishes the "leadership year" as July 1 - June 30.

\*All forms can be found online at <http://www.texasexes.org/chapters/chartering.aspx>.



## **IDEAS FOR LEADERSHIP**

### **Volunteers and Leadership Succession**

Chapters and Networks rely on volunteers. A successful Chapter and Network needs a network of volunteers it can rely on to stay active. Keeping new volunteers active in the Chapter/Networks keeps the group current and energized and allows for the work to be divided among the volunteers.

If you are not constantly recruiting new volunteers, then there will not be a future leader to step up and lead the Chapter/Network into the future. Involving new members in the planning and implementation of a Chapter/Network activity encourages and prepares them to later assume leadership of the activity.

### **Volunteer Basics**

#### *Benefits of New Volunteers/Leaders:*

- Re-energize the Chapter/Network and bring new ideas
- Help with the work
- Bring in other new volunteers
- Bring new connections to community resources – sponsors, speakers, etc.
- Keeps the Chapter/Network from getting stuck in a rut

#### *Why People Volunteer:*

- To give back
- To feel part of the solution and to influence the future
- To have fun
- To meet people that have shared their experiences
- To bring balance to their lives
- To expand social circles and to network
- To support an institution they feel passionately about
- To use and enhance their skills
- To feel useful and needed

#### *Why Volunteers Stay Committed:*

- They have a feeling of belonging, of being part of a team or family
- They feel that they are on “the inside” or have special access
- They see that their participation does make a difference
- They feel appreciated
- They see room for growth and advancement within the group
- They are capable of doing the tasks placed before them

## **Three Steps in the Volunteer Life Cycle**

### *Recruiting Volunteers:*

- Ask them directly and be specific in your ask
- Assume members are interested in volunteering – they just need the right fit; approach recruiting volunteers in a positive manner
- Make it easy to say yes and to get involved
- Advertise the need for volunteers through your email broadcasts and on your website and give them someone to contact
- Be specific about the needs of the Chapter/Network; be specific about both the needs and skills necessary
- Use current volunteers as recruiters – strong volunteers attract strong volunteers
- Host volunteer recruitment events throughout the year
- Always follow up with any potential volunteer and make sure to use them

### *Training Volunteers:*

- Volunteers need training to set their expectations, to define their responsibility, and to have greater buy-in to the Chapter
- Have scheduled volunteer training meetings
- Consider a volunteer buddy system or assigning a volunteer chair
- Provide sound guidance and direction from someone who is experienced and well-informed

### *Retaining Volunteers:*

- Integrate them into the Chapter culture through training and delegating
- Make them feel a part of the Chapter's success
- Make them feel needed and wanted by actually using them
- Delegate appropriate tasks to them – give them a suitable assignment by matching their skill sets with the needs of the Chapter; take their personal preferences into consideration
- Thank them – make sure volunteers know their efforts are appreciated.
- Respect their time and treat them well
- Make sure there is an avenue for their voice to be heard; make sure they feel free to make suggestions and respect their opinions

## **Importance of Delegating:**

### *Basics of Delegating:*

- Delegate means to empower, to entrust
- Delegating should not be seen as a burden but rather as a way to get further involved with the Chapter
- Volunteers must be given something specific to do
- Assignments must occur as a mutual selection

### *The 3 L's of Delegation*

- Look for good people – pay attention at meetings and events for who is energetic and enthusiastic about the event and the Chapter.
- Listen to them – learn what people need from you before you try to delegate to them; you will learn what they like to do and what they want to do
- Let them shine – give them the credit they deserve

### **Tips for Leadership Succession:**

- Start new volunteers in small roles, such as asking them to coordinate an event or an aspect of an event
- Have a succession structure outlined
- Think about who would make a good future officer and cultivate that relationship – should be constantly looking for new leaders, not just right before the June 1<sup>st</sup> deadline!
- Divide responsibilities up among a greater number of people

### **Financial Basics**

- All Chapters and Networks are required to set up their own local bank accounts in the Chapter's/Network's name.
  - It cannot be an individual's bank account.
- All Chapters must submit their own Federal Identification Number.
- It is suggested that Chapters prepare a general budget for the year, along with a budget for each significant event.
- Operating funds vs. scholarship funds
  - Operating funds are used to keep the Chapter/Network in operation. This would include money for any additional mailings, meetings, deposits, and other expenses incurred.
  - Scholarship funds are those designated for student support. They should be sent to the Texas Exes Scholarship Foundation by May 15<sup>th</sup> to be awarded.
    - Donations to an endowed scholarship account will only be returned with express written approval of the TESH 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.
- Donations to the scholarship funds managed by the Texas Exes Scholarship Foundation are tax-deductible.
  - Checks for scholarships should be written to the Texas Exes Scholarship Foundation
- The Texas Exes general liability insurance extends to Chapters. If you need proof of insurance, please contact the Association.

## **Chapter Leadership Job Descriptions**

These are just a sample of the most common offices and their responsibilities. This list is not meant to be exhaustive, but rather a guideline.

*Information for all positions:*

- Association bylaws require that every Chapter leader (all members of a Chapter's Board, Advisory Board, or its committees) is a current dues-paying member of Texas Exes.
- Since each Chapter is unique – and since there are many successful forms of leadership structure – the following should be taken as guidelines.

*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
- With the president-elect, oversee the formation of the nominating committee, 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>
- With the president, oversee the formation of the nominating committee, 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 payment records, 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 Director

### *Membership/ Involvement Chairperson*

- Has their email listed as the email contact on the Texas Exes "move to" notifications
- Help to recruit and retain new members by developing programs or processes for pulling in new members and new volunteers
- Make sure to have membership brochures and Texas Exes branded nametags at every event
  - Can be easily ordered through the Association
- Follow up immediately on communication from people willing to help with Chapter activities.
- Ensure that every Chapter leader is a current member of the Texas Exes
- Promote the value of membership at events
  - Suggestions: through a member ticket price, a member-only door prize, etc.
- Ensure that address update forms are available at all events and meetings or direct them to the Texas Exes website
  - Share all updates with the Texas Exes

### *Secretary*

- Keep current address information on officers/board members
  - Send changes to the Association
- Take minutes at Chapter and Board meetings and send copy to officers and leaders once approved
- Ask for up-date requests at every Board meeting
- Maintain the permanent record of all Chapter proceedings

### *Scholarship Chairperson*

- Set criteria for selecting the Chapter's scholarship recipients and involve the entire committee in making the selections
- Submit Scholarship Report Form and recipients' application – and work with Chapter's Treasurer to include a check, if needed to make the awards, by May 15<sup>th</sup> (or the current deadline, as decided on by the Texas Exes Scholarship Foundation)
- Ensure that every high school has up-to-date information from the UT Freshman Admissions office
- Notify award-winners and applicants who will not receive awards
- Work with the Chapter to honor the recipients locally
- Consider holding a "Student Send-Off" for all students from the area attending UT

### *Texas Independence Day/Social Events Chairperson*

- Organize the Chapter's social events for the Chapter year
  - Appoint and work with specific event chairs, when necessary
- Plan for promotion and publicity as early as possible
  - Work with the Communications Chair in publicizing the event
- Establish financial and operational objectives for the Chapter events
- Keep record of the events – vendors used, lessons learned, etc.

### *Project Worldwide Chairperson*

- Supervise and coordinate the chapter's Texas Exes Care About The Project Activity
- Serve as primary contact to the Texas Exes staff and the partnering organization in regards to Texas Exes Care about The Project
- Work with partnering organizations to plan service activities year-round that will engage Texas Exes and involve their local community.
- Plan for promotion and publicity the Texas Exes Care About The Project as early as possible. Work with the Communications Chair on publicizing the service activity. Take advantage of weekly chapter e-mails sent from Texas Exes and social media outlets.
- Delegate duties to volunteers, board members and committee members. Appoint team leaders when necessary.
- Keep record of the service activity and report to Texas Exes staff (regarding The Project)– submit project, partnering organization used, sign-in sheet for day of activity, number of participants, post-activity evaluations, post-activity report, lessons learned, etc.

### *UT Advocates for Higher Education Chairperson*

- Sign up as a member of the UT Advocates for Higher Education Network
- Ensure that all legislative advocacy on behalf of UT is issue-oriented and completely non-partisan
- Keep in touch with the Association's Public Policy Director so you are up to date on the important issues
- Encourage others in your Chapter to get involved as UT Advocates and sign up online - <http://www.texasexes.org/form/legislative.asp>
- Attend UT's Legislative Day at the Capitol and any other legislative events held by the Association if possible
  - Send another delegate from the Chapter's area if not possible
- Remind Chapter leaders to include an invitation to local legislators to appropriate Chapter events

### *Communications Chairperson (formerly the Marketing/PR Chair)*

- Coordinate the communication and marketing strategies for the Chapter
- Work with the Social Events chair to ensure that Chapter events are promoted in a timely, effective manner

- Submit requests for broadcast emails or paper mailings to Texas Exes staff in a timely manner
- Contact local media to get coverage of events
- Consider setting up a Chapter website if not already in place and ensure that it is kept up-to-date
  - Work with the Chapter's committee chairpersons to maintain correct information
- Consider setting up Chapter presence on social media websites and help to maintain the information presented on these sites

*Texas Exes Business Network (TEBN) Chairperson*

- Coordinate the Chapter's TEBN events and other networking events
- Plan activities/speakers that appeal to your Chapter's community
- Coordinate TEBN events and activities to maximize compatibility with and mutual reinforcement of other Chapter activities

*Exes for Texas Chairperson*

- Maintain communication with Alumni Volunteer Coordinator in the Office of Admissions
- Keep Chapter updated on volunteer opportunities within the Exes for Texas program
- Educate yourself with materials provided by the Office of Admissions about the current UT admissions environment (changes very frequently)
- Develop a committee of interested alumni to help with Exes for Texas initiatives in the Chapter area as needed
- Coordinate Chapter volunteers for Exes for Texas programs, as needed

*Webmaster*

- Manage and update the content of the website
- Work with Board members and Committee chairs to keep content current





## **APPENDIX & FORMS**

## **Helpful Websites**

Texas Exes – [www.TexasExes.org](http://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 – <http://www.utexas.edu/visualguidelines/>

Fast Facts on UT – <http://www.utexas.edu/opa/pubs/facts/enrollment.php>

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

Coach appearances request – <http://www.texassports.com/compliance/coach-appearances.html>

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

**Sample Charter Agreement**



**2013-2014 CHARTER AGREEMENT**

**TEXAS EXES \_\_\_\_\_ CHAPTER**

*The Texas Exes is a membership organization whose purpose is to be an independent voice that champions The University, and to organize alumni and friends into a formidable network to change the world. The vision is to be recognized as indispensable to the UT family, connecting and engaging supporters with each other and The University... This is accomplished in local communities through the volunteer-led efforts of Texas Exes Chapters. To be eligible for official designation and support and services, Chapters must annually submit this charter agreement, along with materials listed, to the Texas Exes Board of Directors. **DEADLINE FOR SUBMITTING THE CHARTER AGREEMENT AND MATERIALS IS June 1, 2013.***

**The Texas Exes Chapter named above hereby applies for charter approval and agrees to carry out the Texas Exes mission in the following ways:**

1. Be aligned with the Texas Exes mission, purpose and vision, including active promotion of Texas Exes membership and proper use of official Texas Exes branding in all communication.
2. Provide programming for diverse interests and age groups.
3. Use Texas Exes resources for communication with Texas Exes members and potential members who live in our chapter's area; encourage alumni to keep their data current by updating their information on the Texas Exes website.
4. Promote Texas Exes membership among chapter members.
5. Obtain and use own Federal Identification Number to identify local bank account.
6. Adhere to the Texas Exes bylaws as well as Chapter bylaws.
7. In a timely manner send all scholarship funds to the Texas Exes for management by the Investments Committee.
8. Attach with this charter agreement the following documents (available at <https://www.texasexes.org/chapters/chartering.aspx>)
  - o List of officers for the current charter year (minimal requirement: president, president-elect, treasurer, membership chair – all must be current Texas Exes members)
  - o Financial Status Report for the previous year, and
  - o Chapter bylaws (if not done so for the 2005-06 leadership year or if amendments)
9. By signing below, The Texas Exes pledges to assist the Chapter in its efforts to carry out The Texas Exes mission in the ways set forth above.

As elected president of this chapter, I agree to the statements above.

\_\_\_\_\_  
*Printed name, 2013-2014 President*  
Signature \_\_\_\_\_  
Texas Exes \_\_\_\_\_ Chapter  
Date \_\_\_\_\_

**Charter Approved by Texas Exes Board of Directors**  
(date): \_\_\_\_\_  
\_\_\_\_\_  
Leslie Cedar, Executive Director and CEO, Texas Exes

# Sample Officer Report



## CHAPTER OFFICER LISTING

FOR THE TEXAS EXES \_\_\_\_\_ CHAPTER

COVERING THE PERIOD OF JULY 1, 2013- JUNE 30, 2014

**2013-14 Chapter President, please read and sign:**

I confirm that these persons are members of The Texas Exes, as required by Association Bylaws, and that the addresses below are correct to the best of my knowledge.

\_\_\_\_\_  
**President**

Please list the email you would like listed as the email contact on the Texas Exes "Find Your Chapter" Website:

If your chapter has forwarding email address set up with the Texas Exes (TexasExesChapterName@alumni.utexas.net), list the email address it should forward to: \_\_\_\_\_

Please note that on the "Find your Chapter" page of the Texas Exes Website, we can list links to social networking sites. Make sure to email the links to us so that we can get them listed.

The email listed for the Membership chair will be listed as the email contact on the Texas Exes "move to" notifications automatically sent to alumni new to your area, therefore the Membership Chair will need to have an active email address.

**NOTE:** The following are suggested officers or committees. Only the positions marked with an "\*" are required; job descriptions are posted online at [www.TexasExes.org](http://www.TexasExes.org). Please list all chapter officers, as well as committee chairs (make copies of last page if necessary.) The chapter should keep a copy and update the Association as changes occur. In order to diversify fiduciary responsibilities, the president and treasurer cannot be the same person.

\* **President:** [Mr., Mrs., Ms., Dr.] \_\_\_\_\_

Texas Exes ID (can be found on label of *The Alcalde*): \_\_\_\_\_ AND/OR

Full Legal Name: \_\_\_\_\_

Membership: \_\_\_ Annual \_\_\_ Life \_\_\_ Associate Life

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: (work) \_\_\_\_\_ (home) \_\_\_\_\_

FAX number(s): \_\_\_\_\_

Preferred E-Mail Address: \_\_\_\_\_

\* **President-Elect:** [Mr., Mrs., Ms., Dr.] \_\_\_\_\_

Texas Exes ID (can be found on label of *The Alcalde*): \_\_\_\_\_ AND/OR

Full Legal Name: \_\_\_\_\_

Membership: \_\_\_ Annual \_\_\_ Life \_\_\_ Associate Life

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: (work) \_\_\_\_\_ (home) \_\_\_\_\_

FAX number(s): \_\_\_\_\_

Preferred E-Mail Address: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: (work) \_\_\_\_\_ (home) \_\_\_\_\_

FAX number(s): \_\_\_\_\_

Preferred E-Mail Address: \_\_\_\_\_

\* **Treasurer:** [Mr., Mrs., Ms., Dr.] \_\_\_\_\_

Texas Exes ID (can be found on label of *The Alcalde*): \_\_\_\_\_ AND/OR

Full Legal Name: \_\_\_\_\_

Membership: \_\_\_ Annual \_\_\_ Life \_\_\_ Associate Life

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: (work) \_\_\_\_\_ (home) \_\_\_\_\_

FAX number(s): \_\_\_\_\_

Preferred E-Mail Address: \_\_\_\_\_

\* **Membership/ Involvement Chairperson:** [Mr., Mrs., Ms., Dr.] \_\_\_\_\_

Texas Exes ID (can be found on label of *The Alcalde*): \_\_\_\_\_ AND/OR

Full Legal Name: \_\_\_\_\_

Membership: \_\_\_ Annual \_\_\_ Life \_\_\_ Associate Life

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: (work) \_\_\_\_\_ (home) \_\_\_\_\_

FAX number(s): \_\_\_\_\_

Preferred E-Mail Address: \_\_\_\_\_

*The email listed for the Membership chair will be listed as the email contact on the Texas Exes "move to" notifications automatically sent to alumni new to your area, therefore the Membership Chair will need to have an active email address.*

**Secretary:** [Mr., Mrs., Ms., Dr.] \_\_\_\_\_

Texas Exes ID (can be found on label of *The Alcalde*): \_\_\_\_\_ AND/OR

Full Legal Name: \_\_\_\_\_

Membership: \_\_\_ Annual \_\_\_ Life \_\_\_ Associate Life

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: (work) \_\_\_\_\_ (home) \_\_\_\_\_

FAX number(s): \_\_\_\_\_

Preferred E-Mail Address: \_\_\_\_\_

# Sample Financial Report



CHAPTER \_\_\_\_\_

## Annual Financial Status Report to Association Headquarters

For the period: \_\_\_\_\_, 2012 through \_\_\_\_\_, 2013 (due by June 1)  
 Federal ID Number used to identify chapter's local bank account: \_\_\_\_\_  
 Chapter Treasurer during reporting period: \_\_\_\_\_

| ITEM   | REVENUE | (EXPENSE) | NET |
|--|---------|-----------|-----|
| BEGINNING BALANCE: _____                         |         |           |     |
| Scholarship Award(s)/Donations                   |         |           |     |
| Operations income from autographed sports items  |         |           |     |
| High School Teaching Award reception             |         |           |     |
| UT Student Send-off                              |         |           |     |
| Young Alumni events                              |         |           |     |
| Texas Independence Day event                     |         |           |     |
| Golf Tournament                                  |         |           |     |
| "Social-only" events                             |         |           |     |
| Administrative expenses                          |         |           |     |
| PR and chapter communications                    |         |           |     |
| Membership/Invovement activities                 |         |           |     |
| Merchandise sales                                |         |           |     |
| Interest income on local funds                   |         |           |     |
| Local newsletter subscriptions or similar income |         |           |     |
| Other - include details in an attachment         |         |           |     |

ENDING BALANCE: \_\_\_\_\_

Preparer, your signature below signifies accuracy of the numbers above.  
 Printed name of person preparing this statement: \_\_\_\_\_  
 Signature of person preparing this statement: \_\_\_\_\_

## Sample Auction Donation Letter

### CHAPTER LOGO

Company  
Address 1  
Address 2  
City, State Zip

Dear Name:

The Texas Exes CHAPTER will be hosting EVENT on DATE to raise funds for our local scholarship fund. Proceeds from the event will go towards scholarships for students from the AREA that are attending The University of Texas at Austin. With the rising costs of education, it is more important than ever that we help our local students achieve their dreams of a college education!

We hope that you will join us in this endeavor by donating to our silent and live auctions. Some of the wonderful advantages of donating to such a great cause are:

- For first-time donors or companies new to AREA, it is an excellent marketing tool to promote your business and brand yourself.
- Every donor will be acknowledged LIST WAYS THEY WILL BE ACKNOWLEDGED.
- The Texas Exes CHAPTER encourages all Texas Exes to patronize donors' places of business.

The Texas Exes CHAPTER prides itself on providing scholarships for AREA high school students who will attend The University of Texas at Austin. Each year, we award over \$AMOUNT in scholarships from our endowed scholarship fund.

Thank you for your careful consideration of our request. We look forward to your participation and support. Please complete the enclosed Auction Donor Form and return in the enclosed envelope.

If you have any questions, please contact our TITLE, CONTACT NAME, at PHONE NUMBER or EMAIL ADDRESS.

Kindest regards,

NAME  
TITLE  
EMAIL ADDRESS

Enclosures

P.S. I have included a copy of the invitation that was sent out to area UT alumni.

**Sample Auction Donation Form**

Chapter Logo  
Auction Donor Form

For additional information, contact CHAPTER LEADER at EMAIL ADDRESS or PHONE NUMBER.

Texas Exes CHAPTER Chapter \* 501(c)(3) Non Profit Organization \* Tax ID # 74-1109640

**Donor Name:** \_\_\_\_\_

**Company Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

**Item Donated:** \_\_\_\_\_

**Market Value:** \$ \_\_\_\_\_

**Full item description (for program):** \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Time limit, restrictions, and special instructions (if applicable):** \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

**Please check one:**  Tangible Item  Certificate/Tickets

**Please check one:**  Item is attached with this form  Item will be mailed to the chapter  
 Item to be picked up by the chapter

**Donor Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Silent Auction Rules**

**TEXAS EXES \_\_\_\_\_ CHAPTER**

The Texas Exes \_\_\_\_\_ Chapter’s Silent Auction will be held \_\_\_\_\_ at the \_\_\_\_\_ from \_\_\_\_\_ to \_\_\_\_\_.

Bids for the Silent Auction are placed by writing your first and last name, bid amount and phone number on the first available line on the bid sheet corresponding to the item number.

Bidding begins with the stated minimum bid. Silent bids must increase previous bid by the stipulated minimum increase or the bid will be invalid. Bids must be made by adults only.

The Silent Auction will close at \_\_\_\_\_. The Auction judge will be the sole authority on the auction.

Item winners will be contacted for payment and item pick-up immediately following the auction. Auction item payment can be made with a MasterCard, American Express, Visa, cash or check made payable to the Texas Exes \_\_\_\_\_ Chapter. Each item winner will receive a donation receipt for their contribution to the Texas Exes \_\_\_\_\_ Chapter.

All payments are due in full by \_\_\_\_\_. The Auction judge reserves the right to sell unpaid items to the next highest bidder. All sales are final, and no refunds will be made under any circumstances.



**Silent Auction Bid Sheet**

**Texas Exes \_\_\_\_\_ Chapter**

**SILENT AUCTION BID SHEET**  
Annual Scholarship Benefit  
(Please refer to Silent Auction Rules)

ITEM #: \_\_\_\_\_ VALUE: \$ \_\_\_\_\_

DESCRIPTION: \_\_\_\_\_

DONOR: \_\_\_\_\_

BEGINNING BID: \$ \_\_\_\_\_ MINIMUM TO RAISE: \$ \_\_\_\_\_

|     | Name  | Phone Number | Bid   |
|-----|-------|--------------|-------|
| 1.  | _____ | _____        | _____ |
| 2.  | _____ | _____        | _____ |
| 3.  | _____ | _____        | _____ |
| 4.  | _____ | _____        | _____ |
| 5.  | _____ | _____        | _____ |
| 6.  | _____ | _____        | _____ |
| 7.  | _____ | _____        | _____ |
| 8.  | _____ | _____        | _____ |
| 9.  | _____ | _____        | _____ |
| 10. | _____ | _____        | _____ |

## Sample Chapter Survey

1. What types of events would you attend if they were offered by the Texas Exes Chapter?
    - Game watching parties
    - Thirsty Thursdays
    - Texas Independence Day Celebration
    - A cultural event at a local museum
    - Family-oriented event, such as a picnic
    - Business networking event/speaker series
    - Community service event
    - Sporting event, such as a basketball game
  
  2. Which of the following times would you be more likely to attend a speaker/networking event?
    - Weekday breakfast
    - Weekday lunch
    - Weekday evening
    - Weekend
  
  3. Which of the following speakers would be a draw for you to attend an event?
    - An Athletics speaker
    - University speaker (Dean, professor, etc.)
    - Local alumni
    - None, I don't need a speaker to attend
  
  4. Would you attend game watching parties for:
    - Football regular season games
    - Football bowl game
    - Basketball regular season games
    - Basketball tournament games (March Madness)
    - Baseball tournament games (College World Series)
  
  5. Where would you be most likely to attend a Chapter event? (click all that apply)
    - Listing of areas in town
  
  6. Are you currently a member of the Texas Exes?
    - Yes/No
  
  7. Would you be willing to host a Chapter event in your home or place of business?
    - Yes/No
- 
- ❖ If yes, please list your name and the best way to contact you.
  - ❖ Would you be willing to serve as a volunteer with the Chapter/Network?
  - ❖ If yes, please list your name and the best way to contact you.
  - ❖ If you have any additional feedback on what your alumni association can do to assist the unique needs of alumni in the Chapter area, please let us know!

## **Texas Exes Insight into Industries Proposal**

### **Benefits to the Chapter:**

- Hosting a different, unique event that will draw in a different crowd
- Offering a networking event to alumni in the area

### **Date:**

- We have found that Tuesdays and Wednesdays work best for networking events

### **Location:**

- Bar or restaurant
  - Someplace with a private room with capacity for at least 75

### **Price:**

- Typical price points
  - \$20 for Texas Exes members/\$25 for non-members
    - Includes two drink tickets and heavy hors d'oeuvres
  - \$10 for Texas Exes members/\$15 for non-members
    - Includes heavy hors d'oeuvres only with cash bar

### **Industries represented:**

- Have representatives from industries that are dominant in the area
- Examples of past industries in other cities
  - Career Transition
  - Finance
  - Marketing
  - Real Estate
  - Telecommunications

### **Industry representatives:**

- Should be UT alumni
- More than one representative per industry
  - If possible, diverse representation per industry
    - For example: Representatives at different stages of their career
- Representatives targeted, pre-selected, invited, and confirmed prior to event
- Purpose of industry representatives
  - Discuss their experience in their particular field with interested alumni
  - Answer questions from alumni
  - Talk about their experience breaking into their field
  - Offer guidance on breaking into the field, if applicable

**Tentative Program (can fluctuate starting times – in commuter-heavy cities, it may be better to start later):**

- 6:00 – 6:30 Registration
- 6:30 – 6:50 Overview of event and introduction of industry representatives
  - 6:30 – 6:32 Welcome by Chapter president/MBBA president
  - 6:32 – 6:40 Overview/purpose of event
  - 6:40 – 6:50 Introduction of industry representatives
- 6:50 – 8:00 Networking

**Texas Exes Contacts and Important Dates**

**Key Staff Contacts**

Courtney Ratliff, Director of Engagement  
512/475-9352 or 800/594-3937  
[ratliff@alumni.utexas.edu](mailto:ratliff@alumni.utexas.edu)

Tiffany Gonzales, Scholarships Coordinator  
512/471-8095  
[gonzales@alumni.utexas.edu](mailto:gonzales@alumni.utexas.edu)

Dana de la Garza, Chapter Administrator

\*For a complete staff directory, please check the website – [www.TexasExes.org/about/staff.aspx](http://www.TexasExes.org/about/staff.aspx)

**Important Dates**

|                 |   |
|-----------------|---|
| August 30, 2012 | Chapter Leadership Conference                                   |
| February 2014   | Project Worldwide   |
| March 2, 2014   | Texas Independence Day  |
| May 15, 2014    | Deadline for Scholarship Information to be given to Association |
| June 1, 2014    | Deadline for Chapter and Network Renewal                        |
| July 1, 2014    | Beginning of Chapter and Network Year                           |

\*For important Texas Exes events, please check the website – [www.TexasExes.org](http://www.TexasExes.org)

## Chapters for 2013-14

|                  |                        |
|------------------|------------------------|
| Abilene          | Lake Granbury          |
| Alaska           | Lake Ray Hubbard       |
| Alice            | Laredo                 |
| Amarillo         | Lavaca County          |
| Arlington        | Limestone-Freestone    |
| Atlanta          | Longhorn Village       |
| Austin           | Los Angeles            |
| Austin County    | Lubbock                |
| Baltimore        | Lufkin                 |
| Bastrop County   | Matagorda County       |
| Bay Area         | Mexico City            |
| Baytown          | Midland                |
| Bee County       | Montgomery County      |
| Boston           | New Jersey             |
| Brazoria County  | New Orleans            |
| Brazos Valley    | New York               |
| Brownsville      | Orange Co. (CA)        |
| Caldwell County  | Orlando                |
| Calhoun County   | Palestine              |
| Charlotte        | Panola Co.             |
| Chicago          | Paris                  |
| Cincinnati       | Philadelphia           |
| Comal County     | Phoenix                |
| Coppell          | Refugio                |
| Corpus Christi   | Rocky Mountain         |
| Cuero            | San Angelo             |
| Dallas           | San Antonio            |
| Del Rio          | San Diego              |
| Dimmitt County   | San Francisco          |
| Denton County    | Santa Fe               |
| El Paso          | South Florida          |
| Fayette County   | Southwest Dallas Co.   |
| Fort Bend County | St. Louis              |
| Fort Worth       | Texarkana              |
| Fredericksburg   | Tulsa                  |
| Gregg County     | Twin Cities            |
| Guadalupe County | Tyler County           |
| Harrison County  | Tyler-Smith County     |
| Henderson County | United Kingdom         |
| Hidalgo-Starr    | Upstate South Carolina |
| Hopkins County   | Victoria Area          |
| Houston          | Waco                   |
| Huntsville       | Washington County      |
| Johnson County   | Washington DC          |
| Kerr County      | West Central Texas     |

## **Networks for 2013-14**

Albuquerque Network  
Baton Rouge Network  
Bell County Network  
Big Bend Network  
Birmingham Network  
Bosque Valley Network  
Galveston Network  
Hawaii Network  
Highland Lakes Network  
Jacksonville, FL Network  
Las Vegas Network  
Lexington, KY Network  
Madison, WI Network  
Milwaukee Network  
Monterey Bay Network  
Montana Network  
North Alabama Network  
Northwest Arkansas Network  
Oklahoma City Network  
Orange Co. (TX) Network  
Ozarks Network  
Palm Beach Network  
Portland Network  
Puget Sound Network  
Red River Network  
Research Triangle Network  
Rhode Island Network  
Sacramento Network  
Salt Lake City Network  
Tampa Bay Network  
Treasure Valley, ID Network  
Vermont Network  
Western Pennsylvania Network  
West Virginia Network

Chapter Advisory Board Members and their assignments for 2013-2014

|  |  |  |   |
|--|--|--|---|
| <p><b><i>Brayshaw, Thomas</i></b><br/> H: 830/990-4523<br/> B: 830/997-8850<br/> E: <a href="mailto:TBrayshaw@alumni.utexas.net">TBrayshaw@alumni.utexas.net</a></p> | <p>Cuero<br/> Fayette County<br/> Fredericksburg<br/> Kerr County<br/> Lavaca County<br/> Palestine<br/> Panola County<br/> Refugio<br/> Texarkana</p>   | <p><b><i>Carrizales, Michael</i></b><br/> B: 512/ 201-5201<br/> E: <a href="mailto:jmciii@me.com">jmciii@me.com</a></p>              | <p>Alice<br/> Austin<br/> Bee County<br/> Brownsville<br/> Corpus Christi<br/> Hidalgo-Starr<br/> Longhorn Village<br/> Mexico City<br/> Orlando<br/> United Kingdom</p>  |
| <p><b><i>Carty, Nate</i></b><br/> C: 972/896-7253<br/> E: <a href="mailto:ncarty97@gmail.com">ncarty97@gmail.com</a></p>   | <p>Boston<br/> Jacksonville, FL Network<br/> New Jersey<br/> New York<br/> Palm Beach Network<br/> Philadelphia<br/> Rhode Island Network<br/> Vermont<br/> Washington, DC</p>                       | <p><b><i>Duchin, Jeff</i></b><br/> B: 214/859-1718<br/> E: <a href="mailto:jduchin@swst.com">jduchin@swst.com</a></p>                | <p>Coppell<br/> Dallas<br/> Fort Worth<br/> Johnson County<br/> Lake Granbury<br/> Lake Ray Hubbard<br/> Limestone-Freestone<br/> Red River Network<br/> Southwest Dallas County</p>                                    |
| <p><b><i>Garate, Maria</i></b><br/> B: 214-403-9757<br/> E: <a href="mailto:mgarate@unitedtexas.com">mgarate@unitedtexas.com</a></p>                                 | <p>Arlington<br/> Bell County Network<br/> Brazos Valley<br/> Madison WI Network<br/> Paris, TX<br/> South Florida<br/> St. Louis<br/> Tampa Bay<br/> Treasure Valley, ID<br/> Network<br/> Waco</p> | <p><b><i>Glander, Troy</i></b><br/> B: 210-240-0392<br/> E: <a href="mailto:tglander@anglawfirm.com">tglander@anglawfirm.com</a></p> | <p>Austin County<br/> Comal County<br/> Guadalupe County<br/> Henderson County<br/> Highland Lakes Network<br/> Hopkins County<br/> Lexington, KY Network<br/> New Orleans<br/> San Antonio<br/> Tyler-Smith County</p> |

Chapter Advisory Board Members and their assignments for 2013-2014

|   |   |  |  |
|---|---|--|--|
| <p><b><i>Gragg, Steven R.</i></b><br/> C: 602/525-3823<br/> E: <a href="mailto:steven.gragg@alumni.utexas.net">steven.gragg@alumni.utexas.net</a></p> | <p>Alaska<br/> Albuquerque, NM Network<br/> Atlanta<br/> Montana Network<br/> Phoenix<br/> Portland Network<br/> Puget Sound Network<br/> Santa Fe Chapter</p>  | <p><b><i>Heller, Richard</i></b><br/> C: 512/791-7955<br/> E: <a href="mailto:rdheller@gmail.com">rdheller@gmail.com</a></p> | <p>Amarillo<br/> Caldwell County<br/> Del Rio<br/> Laredo<br/> Lubbock<br/> Upstate South Carolina<br/> Victoria Area<br/> West Virginia Network</p>                                 |
| <p><b><i>Liao, Kenny</i></b><br/> C: 832/368-3338<br/> E: <a href="mailto:liao.kenny@gmail.com">liao.kenny@gmail.com</a></p>                          | <p>Cincinnati<br/> Las Vegas Network<br/> Los Angeles<br/> Monterey Bay Network<br/> Orange County (CA) Chapter<br/> Sacramento Network<br/> Salt Lake City Network<br/> San Diego<br/> San Francisco</p> | <p><b><i>Naman, Erin</i></b><br/> C: 512/924-9848<br/> E: <a href="mailto:campbellut@gmail.com">campbellut@gmail.com</a></p> | <p>Calhoun County<br/> Dimmitt County<br/> Gregg County<br/> Hawaii Network<br/> NW Arkansas Network<br/> Oklahoma City Network<br/> Ozarks Network<br/> Tulsa<br/> Tyler County</p> |
| <p><b><i>Perez, Mike</i></b><br/> B: 281-734-0469<br/> E: <a href="mailto:mperez80@comcast.net">mperez80@comcast.net</a></p>                          | <p>Birmingham Network<br/> Brazoria County<br/> Fort Bend County<br/> Harrison County<br/> Huntsville<br/> Matagorda County<br/> Montgomery County<br/> North Alabama Network<br/> Washington County</p>  | <p><b><i>Smith, Casey</i></b><br/> B: 713-899-4288<br/> E: <a href="mailto:chs.gulftex@att.net">chs.gulftex@att.net</a></p>  | <p>Baton Rouge Network<br/> Baytown<br/> Bay Area<br/> Big Bend Network<br/> Galveston Network<br/> Houston<br/> Orange County (TX) Network<br/> Rocky Mountain</p>                  |
| <p><b><i>Squire, David</i></b><br/> B: 512/457-5854<br/> E: <a href="mailto:dasquire@alumni.utexas.net">dasquire@alumni.utexas.net</a></p>            | <p>Abilene<br/> Bastrop County<br/> Denton Chapter<br/> El Paso<br/> Lufkin<br/> Midland<br/> Milwaukee Network<br/> San Angelo<br/> West Central</p>   | <p><b><i>Wilson, Zoe</i></b><br/> B: 713-817-7143<br/> E: <a href="mailto:zoewilson@utexas.edu">zoewilson@utexas.edu</a></p> | <p>Baltimore<br/> Bosque Valley Network<br/> Charlotte<br/> Chicago<br/> Research Triangle Network<br/> Twin Cities<br/> Western Penn Network</p>                                    |