UTEP ALUMNI CHAPTERS & NETWORKS

DEVELOPMENT HANDBOOK

"VOLUNTEER LED, STAFF SUPPORTED"

THE UNIVERSITY OF TEXAS AT EL PASO
OFFICE OF ALUMNI RELATIONS

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HELLO MINERS!

First and foremost, thank you for giving your time and sharing your talents as UTEP alumni to continue our mission of "Access and Excellence." You are part of a very special family that continues to celebrate The University of Texas at El Paso and ensure its success.

Being part of an alumni chapter or network is a wonderful way to connect with other alumni and represent our University around the globe. As such, you are our ambassadors and we are grateful for your support.

As you strategize and plan events for your chapters or networks, I urge you to think outside the box. While social gatherings are fun and necessary to network, there are other ways to foster UTEP pride within your groups.

Please consider how your chapter or network can engage alumni in meaningful ways that benefit current UTEP students and encourage your members to utilize their skills and talents. Here are a few examples:

- **Mentoring** – Would your group want to mentor UTEP students or other groups?
- **Internships** – Can you offer paid internships to UTEP students?
- **Support** – Could you or your chapter/network members help alumni who are new to your area, or assist a UTEP student in your area for a job interview or internship?
- **Recognition** – Can your group nominate deserving alumni for the annual Distinguished Alumni or Gold Nugget awards presented each year at Homecoming?
- **Speakers** – Can your chapter/network develop its own alumni speaker series to include members as speakers? It would be great if those speakers would be willing to visit UTEP to speak with our students.

I hope these few examples are helpful. I encourage you to embrace new ideas that will help today's students become tomorrow's involved alumni.

One last tip: Think about what helped you transition from student to professional, and then consider how you, as alumni, might be able to help today's Miners to grow. Your efforts will set a positive example for the next generation of graduates.

We are excited about our Alumni Association's new direction, and hope you are, too.

Thank you for all you do!

With gratitude,

Maribel Villalva
Assistant Vice President of Alumni Relations

UTEP SPIRIT

UTEP FIGHT SONG

Out in the west Texas town of El Paso
Home of the River they call Rio Grande
Down on the border, the town of El Paso
Home of the Miners the best in the land.

Fighting to win, the Miners of UTEP
Long live the College of Mines
GO COLLEGE OF MINES!

Loyal Forever we're standing together
Onward to victory, Orange and Blue!
WE WILL BE TRUE!

Out in the west Texas town of El Paso
Home of the River they call Rio Grande
Down on the border, the town of El Paso
Home of the Miners the best in the land.

UTEP CHANT

X=Clap

X-X-X-X-X-X-X-X (8 claps)
Go Miners Go!
X-X-X-X (4 claps)
Fight Miners Fight!
X-X-X (3 claps) Go!
X-X-X (3 claps) Fight!
X-X-X-X (4 claps)
Win Miners Win!

UTEP PICK HAND SIGN

The UTEP hand sign represents the main tool used by miners, the pickaxe. UTEP athletes, students and fans use it to show pride in the school's famed mining tradition.

To make the hand sign, make a fist and extend the pinky finger and thumb (see picture). When cheerleaders yell "Picks up!," fans are to hold their pick hand signs up in the air. It is also used during the UTEP chant while the words are being yelled out.

The proper motion for the pick is a downward spiking gesture. Starting by the ear, move the arm downward as if the pick is striking the ground.

OVERVIEW

PURPOSE

The UTEP Alumni Association's Articles of Incorporation state that the purpose of the Alumni Association is to "[promote] the interests and overall welfare of the University ... encourage unity and friendship among its alumni ... encourage, aid, support and reward scholastic and athletic pursuits and achievement at UTEP ... and perform such other acts and functions as are customarily performed by alumni associations of other colleges and universities in the State of Texas."

VISION STATEMENT

The UTEP Alumni Association will cultivate pride in the University and foster a strong, effective alumni relations program that connects alumni, students, parents, faculty, staff and the community – locally and globally – to UTEP.

MISSION STATEMENT

To engage, connect and enhance interaction among alumni, students, parents, faculty, staff and the community to support the promotion of UTEP as a nationally acclaimed institution of higher learning.

- To foster the overall enrichment of the University, its students, faculty, staff, alumni and the community.
- To promote the advancement of the UTEP's mission toward national recognition.

To accomplish its mission, the association will:

- Host, sponsor and facilitate activities that inspire unity and friendship among association members to strengthen the ideals and beliefs of the University.
- Encourage membership in the association for students, faculty, staff, alumni, friends and the community at large.

MEMBERSHIP

The association is a nonprofit organization offering members valuable benefits and a variety of ways to stay connected to the University. Promoting the interests and overall welfare of UTEP by encouraging unity and friendship among its alumni will aid, support and reward scholastic and athletic pursuits and achievements for UTEP.

The association members are at the heart of the organization, which is dedicated to cultivating pride in the University and connecting alumni, students, parents, faculty/staff and the community (locally and globally) to UTEP. By connecting the Miner community, the association strengthens the alumni foundation and the future of UTEP. When members participate, they help maintain academic excellence, promote pride and loyalty, and protect the value of a UTEP degree.

"Alumni" herein refers to graduates, as well as non-graduates, who have earned credit hours at UTEP.

MEMBERSHIP FAQS

Why should I become a member?

- UTEP has awarded over 120,000 degrees since it opened its doors in 1914 and has alumni spread worldwide. Becoming a member is simply the best way to stay connected to UTEP!
- As UTEP's reputation continues to grow, so does the value of your degree!
- Membership is an easy and powerful action you can take to keep UTEP moving forward.
- Membership dues support chapters and networks, ensuring that alumni from all over can connect with each other.

How can I join the Alumni Association?

You can join online at www.alumnimembership.utep.edu or by calling 866-GO-MINERS. If you are in El Paso, stop by the Peter and Margaret de Wetter Center (Alumni Lodge), located across from Centennial Plaza (center of campus) at 500 W. University Ave.

Can I join the Alumni Association if I am not a graduate of the University?

Yes, you can support the University by joining as a non-grad or as a friend of UTEP.

How do local networks benefit from membership?

It is through membership dues that the Association can offer support to all chapters and networks. This support comes in the form of maintaining the alumni database, sending communications on behalf of the various alumni groups, maintaining the website, and sponsoring of the grant application program. None of this would be possible without dues-paying members.

BENEFITS AND SERVICES

Reasons to Join the UTEP Alumni Association

MINER PRIDE

Membership supports the goals of the University and the Alumni Association and shows that you are proud to be a UTEP alum!

SCHOLARSHIPS

The association awards merit and need-based scholarships annually to UTEP students.

CAMPUS BENEFITS

- **UTEP Bookstore** - Members receive a 20 percent discount on logo merchandise.
- **UTEP Career Center** - Members can take advantage of the many services offered by the UTEP Career Center, including career fairs, workshops and resume preparation.
- **UTEP Dinner Theatre** - Members are eligible to purchase tickets at discounted prices for the performances offered throughout the year.
- **UTEP Office of Special Events** - Members get exclusive access to UTEP ticket pre-sales for major concerts and special events and possible ticket discounts whenever applicable.
- **UTEP Student Recreation Center** - Members are eligible to purchase a membership to the UTEP Student Recreation Center, along with rates for family members.
- **UTEP Wise Family Theatre** - Members are eligible for a buy-one-get-one free offer during UTEP Alumni Nights.

LOCAL DISCOUNTS

The Association has partnered with the El Paso Apartment Finder to bring members discounts on local apartment community rates.

NATIONAL BENEFITS

- **Access Development** - Access Development is America's largest discount network (**mydeals.com**) with over 350,000 alumni discounts from the world's best brands.
- **Enterprise Holdings** - Enterprise Holdings offers two great brands to give astute business travelers everything they need. National Car Rental has long been favored by frequent renters at airports for their speed of service and vehicle choice. Enterprise Rent-A-Car is the first choice for business travelers who need to rent near their home or office while providing their company savings.
- **Campus Images: Diploma Frames** - Landmark Publishing/Campus Images partnered with association to provide UTEP graduates with museum-quality diploma frames that include a lithograph of the Old Main Building. The frame was created specifically for the Alumni Association and is currently only available here.
- **Jostens: UTEP's Official Ring** - Recognizing the need for an ongoing symbol to represent the honor and traditions of the University, the association helped create the official UTEP ring. We have distilled the essence of UTEP into a classic icon that identifies the wearer as a person of excellence; an individual of integrity and leadership; and a graduate of UTEP. We now present the opportunity to purchase the official UTEP ring.
- **Liberty Mutual** - UTEP alumni save money on their personal auto, home and renters insurance through Liberty Mutual. For more information about Liberty Mutual, call 800-524-9400 or visit Liberty Mutual Insurance. El Paso residents can call 915-584-3030 to contact their local Liberty Mutual office for a free coverage evaluation and a no-obligation rate quote for home, auto and/or renters insurance.
- **Play It Forward Golf** - Play it Forward Golf is a great way to save up to 70 percent while playing your favorite sport. Use it to reserve tee times at over 3,000 courses across the U.S. and over 140 in Texas. Plus, every time you play, your alumni association earns funds for new activities.
- **The Alumni Home Savings Program** - Take advantage of significant savings when buying, selling or refinancing a home from the UTEP Alumni Home Savings Program. Benefits include cash back when purchasing and selling, group discounts on lender fees, a no-cost interest rate float down option, personalized service and more.

- **The Alumni Insurance Program** - Whether you have just graduated, become established with a family and career, or are getting ready to enjoy a well-earned retirement, the Alumni Insurance Program, sponsored by the UTEP Alumni Association, helps you at every stage of your life. By offering a wide variety of insurance plans, our goal is to bring you peace of mind by providing quality products and excellent customer service on health, life and travel insurance.
- **Ticket Monster Perks** - This exclusive association benefit offers you 15 percent discount on ALL sports, concerts and theater event tickets worldwide. Also, enjoy discounts on movie tickets nationwide! Save up to 25 percent at AMC, Regal, Cinemark and many more theaters near you.
- **USI Travel Insurance** - Since 2003, the association Movin' Miners Travel Program has recommended its participants Travel Insurance Services (TIS). We consider it among the best in the industry. Founded in 1973, TIS provides travel insurance to thousands of alumni group travelers and is also now available for your personal trips. Enjoy maximum benefits when you enroll within 15 days of making your initial trip deposit, whether for a UTEP trip or personal travel.

NETWORKING

Network personally and professionally with Miners through programs and activities. Meet Miners in your area who share common interests.

TRAVEL

Explore the world with fellow Miners through the Movin' Miners Travel Program.

TO ALUMNI GROUP LEADERS

Welcome to the UTEP Alumni Network and the Alumni Association (AA). As one of the association's volunteer network or chapter leaders, you have a lot of responsibility. We know that you take this responsibility seriously.

The purpose of this Development Handbook is to provide the best possible information to serve you, your group, the association and your alma mater. It is designed to help individuals develop, grow and operate a chapter or network. It includes ideas to raise funds and follow financial protocol. The guidelines, materials and policies were developed by the Office of Alumni Relations (OAR) staff, the Alumni Association board and leadership of other UTEP alumni chapters and networks.

The University and the OAR values all efforts by alumni who promote UTEP's interests and share its story. Through the years, we have built strong partnerships among our chapters and networks around the country that serve our graduates and the alumni association.

We are pleased to present this handbook to you. We hope you find this handbook useful, and look forward to any feedback you would care to share.

GO MINERS!

THE UNIVERSITY OF TEXAS AT EL PASO
OFFICE OF ALUMNI RELATIONS

CHAPTERS AND NETWORKS

Chapters and networks of the UTEP Alumni Association (AA) typically result from a need (on the part of alumni) within a certain geographical area of the country or where there is enough interest within a particular academic college/program or special interest group to build a chapter or a network.

These groups play a vital role for UTEP's AA.They are our connection at the local, national and international level. The association could not touch so many alumni, both members and nonmembers, without you.

The success of the association can be traced directly to individuals who become members, volunteer their time and engage fellow alumni. UTEP students learn as undergraduates the value and importance of community involvement and many of our alumni continue that desire to be involved wherever their lives take them. Former Miners can be found sharing their talents and skills on governing bodies, advisory boards, elected offices, and as community advocates. We are happy to report that many serve as mentors to current Miners, but we always could use more.

Types and Definitions of Chapters and Networks

- **Academic** - Such groups primarily include graduates of a specific UTEP college or school.
- **Geographic** - UTEP graduates who live within a 50-mile radius of a major metropolitan area. Typically, at least 100 alumni will need to live in the metropolitan area in order to seek recognition as a chapter or a network.
- **Affinity/Special Interest Groups** - Miner alumni who share similar interests or common characteristics are encouraged to join. Recognized affiliation with the University can be extended to include alumni who were active in a student organization, who currently share a particular interest or hobby or are self-identified as a member of a group that is commonly defined by diversity are welcome to continue their affiliation with UTEP.

ALL CHAPTER AND NETWORK OFFICERS/LEADERS MUST BE CURRENT MEMBERS OF THE UTEP ALUMNI ASSOCIATION.

Established Chapters and Networks

ACADEMIC
College of Business Administration Chapter
College of Engineering Chapter
School of Nursing Alumni Network (SONAN)

SPECIAL INTEREST GROUPS
PRIDE Network (LBGTQIA)
UTEP Black Alumni Network (UBAN)
Young Alumni Network

GEOGRAPHIC
Austin Chapter
Dallas/
Forth Worth Network
El Paso Chapter
Houston Chapter
San Antonio Network
Juárez (Mexico) Chapter

UTEP Alumni Association Commitment to Support and Development

The association recognizes the vital importance of alumni to the association, and is committed to creating and sustaining strong, successful alumni groups. The association recognizes its responsibility to be proactive in its support of creating new groups and sustaining existing ones.

Through its board of directors (**Exhibit A**) and OAR staff, the association provides the strategic vision and organizational component necessary for the formation of new groups. The association also offers guidance and resource services to help each group reach its goals and potential. It is an overall gateway for alumni to stay connected to UTEP. **NOTE: ALL EXHIBITS CAN BE FOUND ON THE OAR WEBSITE UNDER THE "GET INVOLVED" TAB** (**alumni.utep.edu**)

Recognized UTEP Alumni Association chapters and networks in good standing will receive the following benefits:

- Tools to identify and connect affiliated alumni
- Inclusion in the OAR website
- Opportunities to contribute to Miner Notes (monthly alumni e-newsletter)
- Funding through annual operational allocations and support of at least one significant event per year through the association sponsored grant application program
- Creation of quarterly financial reports
- Fiscal management, including maintenance of accounts, reimbursements and vendor payments
- Directors and officers insurance coverage and general liability for specific events.
- Online event registration and payment processing

- Guidance in sponsorship development to create opportunities for in-kind support and advice on fundraising strategies.

  NOTE: ALL POTENTIAL SPONSORS, SPONSORSHIP AND/OR FUNDRAISING MATERIALS MUST BE SUBMITTED TO THE ASSOCIATION VIA OAR FOR APPROVAL PRIOR TO ENGAGING IN ANY ACTIVITIES.

- Assistance with giveaways, raffle items and other administrative needs
- Meeting assistance such as the use of the Peter and Margaret de Wetter Center (Alumni Lodge) for alumni-related meetings at no charge on a space-available basis within operational business hours.
- Recognition and opportunity to publish programs and events on the OAR website

Chapter and Networks Commitment to the Association

To remain in good standing, the group must operate in accordance with the association bylaws and policies, its own bylaws/guidelines and all Alumni Association and University guidelines. As ambassadors of the association, members of the group are expected to:

- Integrate and support the association's core values that honor traditions, enhance the alumni experience, advance the University and strengthen the association
- Develop and share protocols for leadership development and succession
- Submit after-action reports within 30 days upon completion of the approved event
- Submit minutes from board meetings (in the case of chapters) within two weeks of the official meeting and meeting notes in the case of networks
- Have representation of the group at all association supported board meetings (teleconferencing available)
- Participate in key association events whenever possible, such as Homecoming activities, Commencement, tailgates and tabling opportunities
- Maintain up-to-date information for all board/leadership team members
- Maintain open communication lines through email and social media
- Plan for regular communication with group members
- Adhere to all graphic standards/branding and policies of the association and the University
- Follow funding guidelines as outlined

FORMING A GROUP

From a University perspective, groups are essential to promoting alumni and University needs and interests. Alumni groups are an extension of the University in various locations throughout the country as well as internationally. These groups can be organized on a city or regional basis or according to affiliations such as academic, college or special interest.

Each new group represents a significant cornerstone in the foundation of UTEP's future success. These groups can be strong factors in supporting UTEP through many worthwhile projects, such as:

- Recruiting students to attend UTEP
- Creating scholarship awards
- Supporting public policy initiatives relating to higher education
- Supporting UTEP's fundraising efforts (e.g., annual giving, special campaigns) through personal gifts and personal solicitation of former students within the group
- Informing interested alumni and others residing within the area about wills and bequests, life income agreements and other deferred giving programs that benefit UTEP

LEADERSHIP

Association groups vary in size and activity so the structure may vary. In order to provide continuity in the group's leadership, each group may create such leadership positions and committee structures as it deems best for its operations. Most groups will consist of four or five leadership/board members. Moreover, the group may combine committee duties with the executive positions. A committee structure gives the group flexibility in its activities and with its volunteers. See Leadership Titles and Duties (**Exhibit B**). A sample list of Committee Structures and their duties is also included (**Exhibit C**).

All groups are required to submit a Leadership Listing (list of all officers and committee chairs) by August 31 of each year to the OAR (**Exhibit D**).

BYLAWS/GUIDELINES

All chapters must utilize and incorporate the bylaws established by the association, which are binding upon the group. (**Exhibit E**)

All networks shall follow established guidelines provided by OAR. (**Exhibit F**)

ALL CHAPTERS AND NETWORKS AGREE TO ABIDE BY THE ASSOCIATION'S POLICIES, RULES AND PROCEDURES.

MEMBERSHIP

- Each officer, board member, committee chair and member of the various alumni groups must be an active dues-paying member of the alumni association. An annual contribution of the current fees are required for membership. Centennial Lifetime or Lifetime membership dues are encouraged and welcomed. Proceeds collected from these two types of memberships go directly to scholarships. Payments may be made monthly, quarterly or annually.
- All members of the association are eligible to become members of any group(s) within their geographic area, special interest and academic affiliation.
- Any and all membership monies collected shall be immediately delivered/provided to the Alumni Association via the OAR for deposit. A membership form must accompany the funds

INDIVIDUAL GROUPS ARE NOT ALLOWED TO CHARGE MEMBERSHIP FEES IN ADDITION TO THE ALLOCATED ASSOCIATION DUES.

INITIAL MEETING

The OAR will help identify UTEP alumni who have expressed interest in forming a chapter or a network. Once identified, the OAR will establish initial contact and begin communication about forming a group. This group of individuals will meet to acquaint themselves and form an organizing committee to complete the following requirements.

- Select an individual to serve as the interim president (in the case of chapters) or interim chair (for networks) of the group.
- Select a committee to draft bylaws (chapters) or guidelines (networks) for review and adoption at the development meeting. All groups are strongly encouraged to use templates provided to you.
- OAR will prepare and email the initial announcement to all alumni within the group's area advising them of the development meeting. With ample notice, the alumni association will attempt to send a representative to assist with the development meeting.

DEVELOPMENT MEETING

At the development meeting, the interim president and/or chair will present the proposed bylaws/guidelines and discuss the purposes and objectives of the group with those in attendance.

- After a full discussion of the proposed bylaws/guidelines and upon their adoption, a copy shall be forwarded to the OAR.
- Once bylaws/guidelines are approved and adopted by the OAR, a leadership team shall be elected or appointed. Proposed candidates shall be contacted to confirm their interest and willingness to serve as leads or point of contact for the new group. Once seated/elected/appointed, the board or leadership team must complete the Leadership Listing (**Exhibit D**).
- A written request for official recognition under the association will be forwarded to OAR for approval.
- Upon official recognition and notification by the OAR, you are now ready to conduct business as an organized Alumni Association group.

ALL GROUPS ARE BY DEFINITION NOT INDEPENDENT LEGAL ENTITIES. THE NEWLY FORMED GROUP IS AN IMPORTANT UNIT OF THE UTEP ALUMNI ASSOCIATION. THEREFORE, ALL ACTIONS AND ACTIVITIES OF THE GROUP ARE SUBJECT TO REVIEW BY THE OFFICE OF ALUMNI RELATIONS AND THE UTEP ALUMNI ASSOCIATION BOARD OF DIRECTORS.

POST DEVELOPMENT MEETING MATTERS

Once the approval has been granted, the OAR will inform the group. The group's leadership team will meet to discuss future activities, establish a calendar of events and prepare an operating budget. Committees, as necessary, shall be formed to finalize these discussions.

At subsequent meetings, group members will be given updates on planned activities and group developments.

As they are historical documents, minutes/notes are expected to be taken during all official meetings. A sign-in sheet with the names, addresses, email addresses and phone numbers of those in attendance also will be maintained.

The group will copy the OAR on all minutes/notes distribution lists.

FINANCES AND BUDGETING

Chapters and networks must adhere to Financial Protocol policies described in this handbook.

EVENT PLANNING

- All groups are required to prepare a tentative calendar of events for the upcoming fiscal year.
- When planning an event, the group must prepare a projected budget by completing the Event/Activity Planning Form (**Exhibit G**). The form will be submitted to the OAR staff at least six weeks prior to the event.

AFTER-EVENT STEPS

- After all events, an After-Action Event/Activity Summary should be submitted to the OAR within 30 days after the date of the event (**Exhibit H**).

INDEMNITY CLAUSE

To the extent permitted by law, the association group member agrees to indemnify and hold harmless the association, its employees, officers or agents against all claims, damages, losses, liens, suits, judgments and expenses arising out of or caused by group activities or any part thereof, which are caused in whole or in part by any negligent act or omission of the group or any of its officers or members.

CHAPTER OR NETWORK EVENTS

All groups are encouraged to organize and/or host at least one or more recurring events for each of the following purposes:

- **Professional development** - (in conjunction with the University Career Center) workshops for UTEP students, speakers' bureau, career fairs, and lectures
- **Community service/Volunteering opportunities**
- **Student engagement** - participate in high school college nights, career fairs, freshman send-off, mentoring, or offer a speakers bureau for local high schools or college classes
- **Athletic events** - pep rallies or pre-game parties, game viewing parties, or locally hosted golf outings or tournaments, home and away tailgate parties and events surrounding most athletic activities
- **Scholarship fundraising** - casino nights, silent auctions, garage sales, banquets and golf tournaments
- **Social or networking events** - receptions, socials, tours, fine arts performances, pizza parties or formal events such as dinners, that may involve other alumni groups , colleges, departments or entities
- **Membership recruiting** - mix and mingles, receptions, tabling opportunities, picnics and other activities

NOTE: SOME EVENTS MAY BE LIMITED TO ASSOCIATION MEMBERS ONLY.

SPECIAL ACTIVITY PLANNING

Recognized UTEP alumni groups are expected to create and/or continue to develop and encourage alumni engagement that is unique and can build upon tradition.

- Event planning should be detailed in the group's fiscal year annual plan.
- To help plan a successful event, see the Event Coordination Process and Timeline (**Exhibit I**).

TIPS AND GUIDELINES FOR EVENTS

- Host a variety of events that appeal to a wide range of members
  - UTEP alumni - build a lifelong relationship based on value
  - Current UTEP Students - build University pride and success
  - UTEP community - leverage internal UTEP talent and resources
  - Community at large - grow community support for UTEP
- Keep events' cost reasonable
- Keep programming as brief as possible
- Silent auctions are recommended
- Promote events on social media
- Have sign-in/registration sheets available
- Capture the event with photos and video
- You can never have enough help. Volunteers are valuable assets
- Brand your event with UTEP memorabilia
- Have association membership and literature present
- Make attendees feel welcome
- Contact OAR staff for proper procedures if alcohol will be served at the event
- OAR staff can provide proof of insurance if needed for your event
- Follow-up after each event to thank attendees for their participation
- The association is a 501c3 nonprofit, tax-exempt organization. All groups may take advantage of this benefit and use the tax-exempt certificate for all purchases related to the event
- When planning an event, please note that a portion of the proceeds may be considered a donation and therefore, tax deductible. This is based on the group's agreement and approval of the OAR staff in order to determine what percentage of the total cost can be considered tax deductible

OUTREACH

Reaching out to nonmembers through a variety of events helps to target different demographics as they encourage association membership.

Increasing membership benefits all alumni groups – membership provides funding for programming activities, scholarship opportunities and leads to new volunteers and engagement.

FINANCIAL PROTOCOL POLICY

A chapter or network is an important component of the association. This document will establish standardized policies and procedures to ensure compliance with all nonprofit organization guidelines, and risk management best practices, including centralization of accounts, as required by our insurance policies and the University's financial policies.

FISCAL YEAR

The fiscal year shall be from September 1 through August 31.

COMPLIANCE

All group accounts will be kept in accordance with all nonprofit organization guidelines.

UTEP ADMINISTERED GROUP ACCOUNTS

Once the association approves the group guidelines and notifies the group representative of their ratification, OAR staff members will work with appropriate parties on the UTEP campus to establish a cost center account. The account will be used to record all group events, operations and expenditures.

To be in compliance:

- All financial transactions associated with the group will require electronic approval by at least two members of the leadership group.
- Group accounts are housed in the Division of General Accounting Services at UTEP via the OAR.
- Once the account is established, the leadership will be provided with the account name, cost center number and informed that the account has been activated.
- Funds must remain in University accounts to be administered by the OAR staff.

ACCOUNT DEFINITION AND PURPOSE

- The cost center account will be used to deposit monies collected by and for the group to pay any outstanding expenditures.
- The UTEP Development Office will acknowledge receipt of all donations for tax deduction purposes.

DEPOSITS/RECONCILIATION

- Groups must deposit all monies received for any event or group activity by the next business day, with all sales receipts accounting for each transaction.
- All checks, invoices, receipts and supporting documentation must be submitted to the OAR for deposit into the cost center account for reconciliation and auditing purposes.
- Once funds have been deposited into the account, a receipt/note will be sent to the group acknowledging that the funds have been received and deposited.

PAYMENT REQUESTS

- In order to process vendor payments, all vendors (individuals and/or organizations) must be on file with the University's financial system (UT System). If in doubt about a vendor's status, contact the appropriate OAR staff member and submit full name, mailing address, email, and phone number to help identify the vendor on the system.
- To add a new vendor, a Supplier Information Form (SIF) must be completed. Once the SIF is complete, it should be sent to OAR. Please allow ten business days for the vendor to be established in the UT System. OAR staff will inform the group about vendor inclusion.
- Groups will provide a final quote or estimate for services requested prior to the event. OAR staff will initiate the payment process.
- After the event, final invoices must be sent to OAR for payment. OAR staff will process payment requests and/or reimbursements. All reimbursements and requests for payments will need approval of the president/chair and treasurer of the group before disbursing funds.
- Payment will be issued within 30 days of receipt of final invoice.

REIMBURSABLE AND PRE-APPROVED EXPENSES

- Expense authorizations must be approved by at least two officers. OAR staff must be copied and kept informed of relevant communications.
- Group members may be reimbursed for reasonable and necessary **pre-approved** expenses. The purchase of alcohol will not be considered a reasonable and necessary expense.

- Since the association is a tax-exempt organization, any sales tax paid will not be reimbursed. The tax exempt form will be provided upon request.
- All requests for reimbursements must be submitted no later than 30 days after the date of the expense.
- A deposit to hold a venue or to cater an event may qualify as a pre-approved expense.

GRANT APPLICATION PROGRAM

- The association offers financial support to alumni chapters and networks that coordinate events or activities that involve UTEP alumni.
- In order to be considered for funding, events and/or activities must do one or more of the following:
  - Offer services to alumni that advance the University's mission and strategic goals.
  - Engage alumni with the University for a lifelong relationship.
  - Enhance the promotion of alumni and outreach activities while increasing alumni membership.
- Grant applications (**Exhibit J**) are available on a quarterly basis.
- For the approved event and/or activity to be considered, the application must be completed and submitted on a timely basis.
- Grant requests must not exceed $1,000 per quarter.
- Grants are not cumulative.
- One grant per event/activity.
- Unused grant funds will be returned to the association.
- All applications will be reviewed by an ad hoc Committee for Allocations comprised of association members and OAR staff.

All group events and programs must be reconciled by providing an after action report for all events/activities. The after action report must be submitted to OAR staff for approval with supporting documentation within 30 days of the event. Failure to submit an after action report will constitute disqualification from future grants.

SCHOLARSHIPS

All chapters and networks have the opportunity to raise funds for scholarships. Funds collected by a group through events must be transferred to the group cost center and remain with the University until a scholarship account is requested by the group and is established by the Office of Scholarships based on their policies and procedures. All groups must work through the OAR to initiate this process.

FINANCIAL REPORTING

The OAR will provide a financial summary report to all groups on a quarterly basis on the 5th day of the month after first quarter a given fiscal year (a fiscal year starts on September).

NET COMMUNITY

- Net Community is a software tool managed by University Development through OAR to manage registration procedures.
- Coordination for any event that requires online registration and/or payment must be initiated at least six weeks prior to posting date.
- An Online Event Announcement/Registration and Payment Request form (**Exhibit K**) must be completed with final details and submitted to the OAR at least six weeks in advance.
- It is recommended that registration and/or payment for any event be open for three to four weeks prior to the event date, but must be closed no later than three days prior to the event date.
- Please refer to the Event Coordination Process and Timeline (**Exhibit I**).

COMPREHENSIVE INSURANCE COVERAGE

The association carries directors and officers insurance, protecting against personal liability of groups and association leaders from legal claims against the association or any of its officially designated groups. As such, any funds generated need to be deposited in the group's designated UTEP Cost Center in compliance with risk management strategies.

In the case of legal action taken against the Alumni Association, this policy protects personal assets of the board members and group leadership from being attached if such claims were successful.

COMPREHENSIVE LIABILITY COVERAGE

The association sponsors a $1 million policy at the local, regional and national level to provide liability insurance for all events and activities sponsored by the association. The coverage does have restrictions on the total number of claims. It also includes clauses for property damage, bodily injury and events where alcoholic beverages are offered but not sold.

MARKETING AND COMMUNICATION

Alumni groups have several opportunities to communicate with local membership and promote their activities and efforts. OAR staff oversees the coordination and dissemination of written communication and/or efforts through several social media outlets and e-blasts to reach out to the alumni community. Groups are strongly encouraged to ask event participants to maintain current personal information.

MINER NOTES

Miner Notes is the online newsletter sent to all email addresses in UTEP's alumni database. Chapters and networks are encouraged to submit stories and information for inclusion.

- Submissions should be only a few sentences and include a picture, if applicable.
- The deadline varies each month, but email reminders are sent to the groups with notice of the deadline.

ALUMNI ASSOCIATION WEBSITE

alumni.utep.edu

The association offers web space to officially recognized groups. Web pages are ideal ways to provide detailed information to members and nonmembers. It is important to utilize and maintain your site to showcase upcoming and past events.

- Use the Online Event Announcement/Registration and Payment Request (**Exhibit K**) to submit update or announcement (Please follow instructions on the form).
- Submit the online event announcement request no less than six weeks prior to posting date.

ALUMNI GROUP PAGES

alumni.utep.edu/network name

Review your web page content monthly to ensure officers, photos, contact information and news specific to your group is up to date.

WEB CALENDAR

alumni.utep.edu/events

The alumni web calendar provides a less formal platform for networks to post upcoming events of interest to alumni.

ONLINE EVENT REGISTRATION

A link from the group's page and/or calendar page will take the user to a reservation or payment page.

NET COMMUNITY

- Online Event Announcement/Registration and Payment Request form (See **Exhibit K**) must be completed with final approved details and submitted to the coordinator for membership and marketing via email two weeks prior to posting date.
  NOTE THAT THIS FORM MAY ALSO BE USED FOR ALL ONLINE AND EMAIL EVENT ANNOUNCEMENTS.
- It is required to submit a marketing/posting schedule to resend announcements.

E-BLASTS (EMAIL ANNOUNCEMENTS)

The OAR has the advantage of access to the alumni database. Therefore, we can target specific groups of alumni by age, graduation date, geographic location, etc. Using each network's specific e-blast banner, our system allows us to customize the e-blast so that the sender's name can be altered as well as the reply address to best fit your needs.

Use **Exhibit K** - Online Event Announcement/Registration and Payment Request – to submit or update an announcement.

ALL CONTENT IS SUBJECT TO EDITING AND APPROVAL BY THE OAR.

SOCIAL MEDIA

The association encourages all groups to actively engage alumni using social media (Facebook, Twitter, YouTube, Snapchat, Instagram, and LinkedIn) following social media protocol and granting administrative access to designated OAR staff. Alumni groups must connect with the association's social media sites to stay up-to-date with promotions, news and events.

Alumni groups are required to host their own social media pages to better target their specific demographics. In some instances, a committee may be created for the purpose of managing social media for the group. All social media pages will be monitored to maintain professional appearance, content and uniformity. Two OAR staff members must receive administrative rights to social media accounts. All groups must follow university guidelines for social media. (**Exhibit L**)

UTEP GRAPHIC IDENTITY GUIDE

Trademark Licensing

The words "The University of Texas at El Paso," "UTEP," "Miners," the official UTEP seal, UTEP pickaxe logo and Miner logo are property of UTEP and are protected trademarks. The association logo and those of the individual chapters, networks and special interest groups are also protected images because they include elements such as the "pickaxe" and the word UTEP. When considering the use of any UTEP and/or alumni association images, prior approval is required. OAR staff will assist all groups to secure prior approvals by submitting paperwork needed on their behalf. Once the process has been completed and approved, OAR staff will notify the group.

The trademark office requires the following items to submit a request:

- Quote from the vendor
- Completion of an Internal Request Form
- Final design as it is to be used on the product

Trademark approval may take up to two weeks, it is recommended to anticipate the need to print these images on any item.

Licensing and Royalties

Any person, business or organization that desires to use UT System trademarks in any manner and for any purpose must be licensed to do so.

NOTE: THE OAR WILL GUIDE CHAPTERS AND NETWORKS THROUGH THE TRADEMARK APPROVAL PROCESS AND WILL ANSWER ANY QUESTIONS RELATED TO GRAPHIC IDENTITY.

VOLUNTEERS AND LEADERSHIP SUCCESSION

It is proven that successful chapters and networks rely heavily on volunteers in order to remain active. Keeping new volunteers active keeps the group current and energized, allowing for the work to be divided among the volunteers. No one volunteer should try to do everything! There is no leadership succession without first recruiting new volunteers. If you are not constantly recruiting new volunteers, there will not be a future leader to step up and lead into the future. Involving new members in the planning and implementation of new groups encourages and prepares them to later assume leadership of the activity.

BENEFITS OF NEW VOLUNTEERS/LEADERS

- Re-energize the group
- Additional help with the volunteer workload
- Supply expertise
- Coordinate new volunteer efforts and recruitment
- Bring new connections to community resources – sponsors, speakers, etc.
- Keep the group from getting 'stuck in a rut'
- Ensure that community interests are represented, which should lead to greater involvement

REASONS 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 experiences
- To bring balance to their lives
- To expand social circles
- To network
- To support their passion for an institution
- To use and enhance their skills
- To feel useful and needed

VOLUNTEERS' MOTIVATING FACTORS THAT MATCH THE NEEDS OF THE CHAPTER OR NETWORK

- A person who has limited time for club activities might be a great behind-the-scenes volunteer who can update social media pages, coordinate email blasts, and/or create scripts for events, etc.
- A person who feels compelled to give back to UTEP would make a great membership chair, member of the scholarship fundraising, or leadership/officers selection committee.

RECRUITING VOLUNTEERS

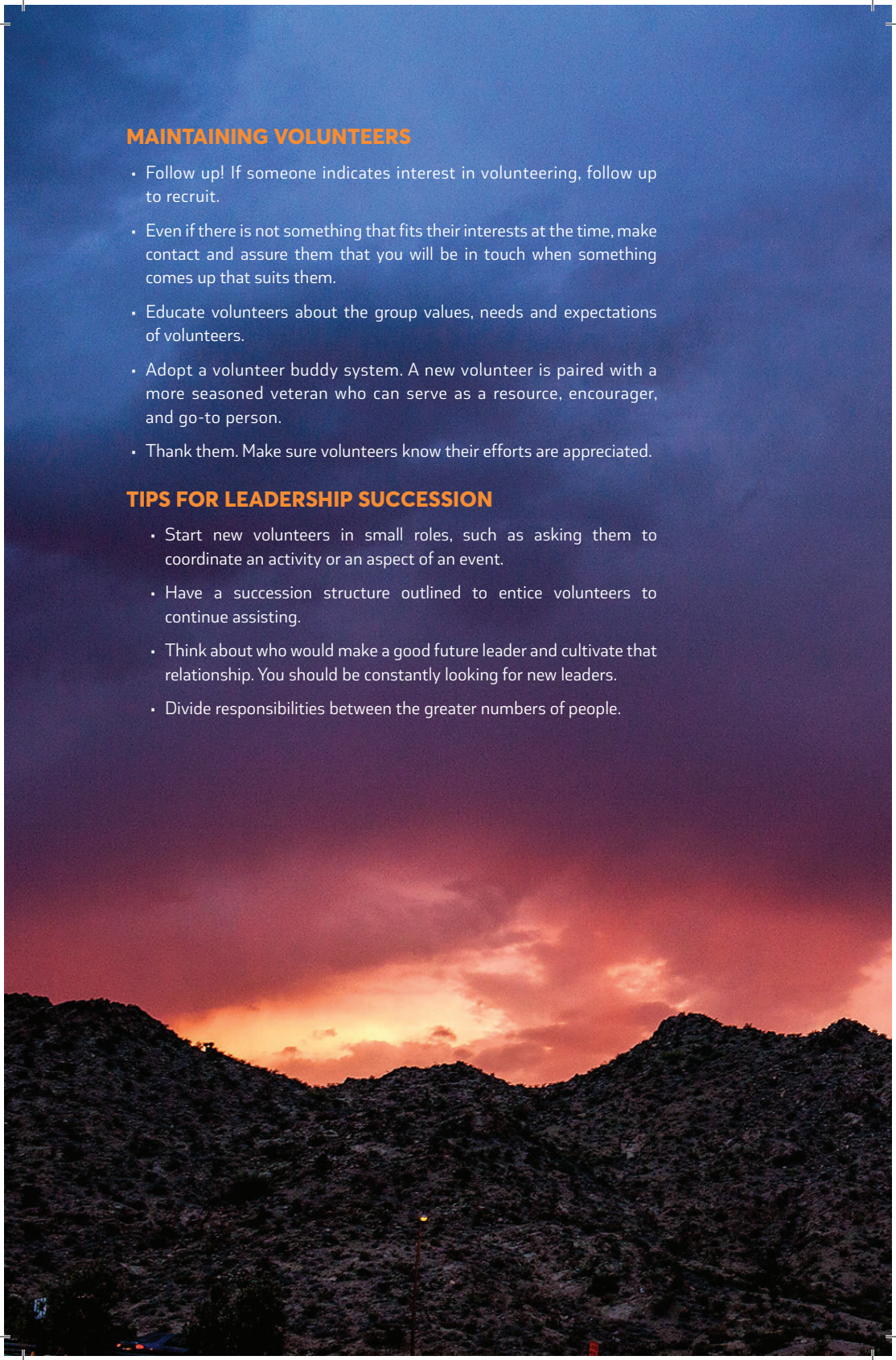
- Ask them directly. Don't rely solely on those that approach you. Do not be afraid to ask for help. Potential volunteers may think their services are not needed if they are not approached.
- Assume members want to help, and are in search of the right fit.
- Use a positive approach to recruiting.
- Make it easy to get involved.
- Have a volunteer signup sheet placed prominently at every event.
- Follow up with those who sign up as potential volunteers.
- Advertise the need for volunteers through your website, social media and email blasts. Be sure to include contact information.
- Be specific about the group's needs, and the necessary skills of the job.

MAINTAINING VOLUNTEERS

- Follow up! If someone indicates interest in volunteering, follow up to recruit.
- Even if there is not something that fits their interests at the time, make contact and assure them that you will be in touch when something comes up that suits them.
- Educate volunteers about the group values, needs and expectations of volunteers.
- Adopt a volunteer buddy system. A new volunteer is paired with a more seasoned veteran who can serve as a resource, encourager, and go-to person.
- Thank them. Make sure volunteers know their efforts are appreciated.

TIPS FOR LEADERSHIP SUCCESSION

- Start new volunteers in small roles, such as asking them to coordinate an activity or an aspect of an event.
- Have a succession structure outlined to entice volunteers to continue assisting.
- Think about who would make a good future leader and cultivate that relationship. You should be constantly looking for new leaders.
- Divide responsibilities between the greater numbers of people.



LEADERSHIP DEVELOPMENT

To ensure that strong leaders are always in place and ready to take on increased responsibility, leadership development must be considered as a method to ensure a near seamless leadership succession process. The group guidelines/bylaws should indicate a leadership succession plan, primarily when the chapter or network chair/president position becomes vacant. Other officers are no less important. Having interested and capable members in line to succeed an officer will contribute to the group's overall success and credibility.

In addition, new members (or those not yet active) should be encouraged to join committees, help with event planning, and also should be asked to be an active part of group meetings. Having the same people responsible for doing the majority of the group's administrative work will often discourage others from increasing their level of involvement. The group will be strongest when there is an active mix of senior volunteers that mentor new members and those who have been less involved in the past.

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