AFFILLIATED ALUMNI ASSOCIATION AND NETWORK

GUIDEBOOK

Alumni Association
UNIVERSITY OF **HOUSTON**

TABLE OF CONTENTS

Dear UH Alumni Association Leadership and Volunteers,

You make it happen! Let me first say, on behalf of the over 316,000 UH alumni around the city, state and country, thank you for your dedicated service to our alma mater and your local alumni network or college association. We greatly appreciate your leadership and value your volunteer spirit.

Each year, your volunteerism helps us grow our brand, allowing us to engage and celebrate our alumni and what they mean to UH now and in the future. The role you fulfill in helping our alumni celebrate their love for the University is recognized and valued. Serving as a UH Alumni Leader and volunteer, you are reinforcing the UH story in your part of the world!

We encourage you to continue in your efforts as we unite Cougars worldwide. Thank you again for your service and commitment.

True We'll Ever Be,

MIKE PEDE ('89)
Associate Vice President, Alumni Relations

ASSOCIATION AND NETWORK CONTACTS

Hello Fellow Cougars,

It is with great pleasure that I serve as the Director of Affiliated Alumni Associations for the University of Houston Alumni Association. I am a two-time graduate of the University, with a BS in Sports and Fitness Administration and an MA in Sports and Fitness Administration. I am delighted to be back as I help facilitate the experiences that our alumni enjoy!

I am fortunate to work alongside so many dedicated and passionate alumni. I can't wait to see what your groups set out to accomplish!

**TAYLOR SANTANA ROULEAU
('16, M.A. '17)**
Director, Affiliated
Alumni Associations
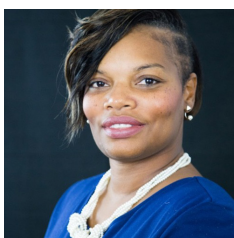
CABINA WOODS
Program Manager II,
Affiliated Alumni
Associations

NYOKA NERO
Program Manager I,
Affiliated Alumni
Associations

IMPORTANCE OF AFFILIATED ALUMNI ASSOCIATIONS AND NETWORKS

Since 1940, the University of Houston Alumni Association (UHAA) and the UHAA Foundation (UHAAF) have served and supported the University of Houston, its over 316,000 alumni (update to current number), its friends, and the community it calls home. On September 1, 2013, UHAA merged most of its operations into the university's Office of Advancement. This merger allows UHAA and UH to align the university's services to alumni with the activities of the alumni associations and networks, with the goal of enabling and encouraging lifelong alumni relationship with UH. The UHAA Foundation (UHAAF) continues to have oversight of all associations and networks under it's charter and MOU with the University.

From student scholarships, legislative advocacy, alumni networks to communications, UHAAF works to enhance the alumni experience. Our groups are the lifeblood of the UHAAF and are an extension of our values and goals, which are vital to fostering relationships with alumni across the country. To date, we have 43 Affiliated Alumni Associations across the nation, serving thousands of alumni.

ASSOCIATION FORMATION

An Affiliated Network can be formed in any geographical area where a significant number of alumni live and/or within a network or association of shared interests. An Affiliated Association can be formed based on a University of Houston College or shared interest.

To Form a Network or Association:

- Prospective Affiliated Alumni Association or Networks must complete and submit the UHAAF Statement of Interest Form. This ensures that the goals of the prospective network or association align with those of the UHAAF.

- Upon completion of the Statement of Interest Form, the prospective Affiliated Association or Network will hold an initial Interest Event to gauge the interest of their community outside of the people who would like to start the network or association. The meeting must have at least 25 attendees to move forward with submission to the Constituent Relations Committee of the UHAA Foundation Board for approval.

- The prospective Affiliated Alumni Association or Network must present their goals and purpose to the Constituent Relations Committee.

- The Constituent Relations Committee on the UHAAF Board will decide if there are any conflicts of interest to any existing groups before recommending the prospective network or association to the Board for approval.

- If approved, the new Affiliated Alumni Association or Network will submit their budget (what they estimate to make and what they plan to spend for their programming), Board Members and Titles, Calendar of Events and Marketing/Communication needs to their Point of Contact at the UHAAF.

PURPOSE AND ROLE

All UHAAF Affiliated Association and Networks should have several common purposes:
- Extend UH beyond the boundaries of the University and the City of Houston.

- Connect UH alumni, students and supporters of the University by providing information, interaction, services and programming.

- Increase active engagement within the UHAAF.

- Support UH when athletic teams, members of the administration or faculty travel to your area.

- Provide a network of fellow UH alumni for new graduates and new members of your community.

- Provide scholarships to area-wide students.

TIPS FOR SUCCESS

- Plan monthly meetings of association or network leadership to discuss association/network business, events, communication and other needs.

- Develop an annual calendar of events to facilitate planning and work with the UHAAF staff for communication plan.

- Diversity of Activities – watch parties, happy hours, scholarship receptions, academic community service, etc.
  - Avoid over scheduling, as well. Quality over quantity!

- Delegate! It is always great to build a pipeline for future leaders of your organization.

- Keep UHAAF staff up to date on your activities, so we can help spread the word.

- Create opportunities for the new people in your organization to receive leadership experience. You never know when your next president may show up!

FOUNDATION OF SUCCESS

- Networking & Recruiting
- Community Service
- Student Engagement
- Athletic Support
- Collaboration

UHAAF SUPPORT

UHAAF will provide the following items and services to their associations and networks. (See Affiliated Alumni Association and Network Contract)

- Giveaways and Decorations
  - Pom Poms, Tabletop Signs, Hand Fans, etc.
  - Gift basket (Requires two-week notice)

- Registration Links
  - Need Fair Market Value/Ticket Sales being sold.

- Personalized Association or Network Website and Logo (See Branding Guidelines) as par of the UHAAF.com website

- Usage of Alumni Center Spaces
  - Will be charged cleaning fee, if necessary.

- Marketing for major events. (Events with more than 50 expected guests or $3000 in revenue.)
  - Requires six -week notice.

- Collaboration with University Events

ASSOCIATION AND NETWORK LEADERSHIP

Every Association and Network will have a formal leadership structure, although that structure can be modified to better fit your needs. We recommend the following officers and committees:

President (Approx. 8 Hours a week)
- Provides leadership and direction for the network or association.
- Actively communicates with the UHAAF team.
- Leads network or association development.
- Oversees the financial health of the network or association.
- Manages and mentors the network or association officers.
- Reviews committee structure to ensure it fits the needs of the network or association.
- Serves as network or association spokesperson.
- Serves as liaison to the UHAAF Board.
- Coordinates all events with your UHAAF liaison.
- Attends President's Council meetings.
- Keep record of all meeting minutes

Vice President/President Elect (Approx. 8 Hours a week)
- Assists the network or association president with development and management of network or association.
- Identifies and recruits new leaders and committee members.
- Recruits new network or association members.
- Oversees and leads network or association in absence of president.
- Aids the president in preparation to fill the position in the future.
- Attends President Council meetings when president cannot.

Secretary (Approx. 4 Hours a week)
- Record minutes of all board meetings and provide to President and board members
- Maintains all chapter records, including bylaws, meeting minutes, event calendar, news and member roster/directory.
- Distributes written correspondence as it relates to network or association business.
- Works with relevant committee chairs to coordinate notes for committee meetings.

Treasurer (Approx. 4 Hours a week)
- Maintains financial records of network or association and reconciles discrepancies on a monthly basis with UH Alumni Association.
- Deposits all funds received as soon as possible in official bank account through UHAAF.
- Provides receipts for all funds collected and disbursed.
- Receives monthly financial reports from the UHAAF one month after (ex. March 2023 financials sent out April 25, 2023).
- Directs preparation of an annual budget.
- Keep Board members informed of financial situation at each business meeting

Communications (Approx. 4 Hours a week)
- Responsible for communications to all members, sponsors and partners.
- Ensures everyone receives timely, complete information.
- Handles network or association social media accounts.
- Works with UHAAF to maintain the group's website.
- Takes photos at all events for social media and records.
- Follows branding guidelines issued by the University of Houston.
  - All uses of logo must be approved by UH Branding.

Membership (Approx. 4 Hours a week)
- Generates ideas to attract new members and retain current members.
- Maintains accurate records of network or association membership and volunteers.
- Works to recruit new members through programming.

Events (Approx. 4 Hours a week)
- Plans and executes all network or association events.
- Works with external parties as needed for equipment, A/V, etc.

Scholarship (Approx. 4 Hours a week)
- Determines criteria for all network or association scholarships.
- Work with UHAAF to get application posted on the UHAAF Website
- Creates a committee to review applications.

General Member (Approx. 2-4 Hours a week)
- Attend committee meetings
- Volunteer for network or association events
- Step in for committee members when they can't make it

    *Officers and committees can be combined as needed based on network or association.

TRANSITION OF LEADERSHIP

It is important to create and maintain a leadership framework that supports longevity and succession planning. Leadership rotation is necessary to maintain a dynamic network or association, increase creativity and avoid burnout!

UHAAF recommends having a transition plan in place within the first year of a group's existence. Outgoing leaders should mentor incoming leaders throughout their terms of service. Every officer and committee chair should work to identify potential leaders and encourage them to be as involved as possible.

Follow by-laws term limits clause can be helpful to avoid burnout and keep a consistent election schedule which will aid in the planning of all association activities.

As the transition to new leaders takes place, ensure all relevant people have access to all necessary accounts, passwords, etc.

Keep everything in writing so your entire network or association membership can know what the timeline and process is.

RECRUITING

Recruiting a diverse board and volunteers that reflect your association membership can be challenging but can also lead to a stronger network or association overall. Here are some tips for recruiting potential members.

- Work with existing leaders and volunteers to recruit others.
- Determine skills that could benefit your chapter and work to recruit volunteers who can help fill those needs.
- Keep your board diverse.
- During events, don't be afraid to discuss the need for additional volunteers and board members. People often won't seek opportunities, but will help fill a need.
- Utilize committees for larger tasks or events to avoid one person doing too much.

- Consider creating transitional positions, such as vice chairs for committees to create a leadership structure that allows for "on-the-job training." This allows members to serve in a leadership role a year before moving into a leadership position.

- Develop clear descriptions for officers/members so everyone knows what is expected of them.

- Implement training opportunities for volunteers to help them feel more confident in their skills for a given task.

MEETINGS

Consistent and timely meetings are key to engaging constituent audiences. The meeting requirements include that you have at least one meeting of the executive members once a month. These meetings can be held in person or virtually.

The goal of these meetings should be to inform and engage your members from time to time. Recommended topics include event updates, information on upcoming tasks, recruiting, UHAAF updates, creating a calendar of events, or new business.

Minutes should be taken at any meeting for an Association. These minutes should then be distributed to everyone. This helps keep everyone updated.

FINANCES

All groups have their own accounts under UHAAF. The groups are responsible for their own expenses, events and scholarships, which come out of this account. As a network or association, you are the host of the events and provide all finances to cover the related expenses, unless agreed upon in advance. The UH Advancement and Alumni business office is available for any questions or information regarding the budget process.

You will receive your updated financial report on the 25th of every month for the previous month's expenses (ex. March 2023 financials out April 25, 2023). If there are any issues noticed on the report, connect with UHAAF to resolve the issue.

For groups that would like to start an endowment, the funds will need to be in the group's account. The network or association will have to raise $25,000 for the endowment to kick off the interest. UH rules are $5000/year payments for five years to create the endowment. We also suggest putting in a little more than $25,000.

SCHOLARSHIPS

Scholarships awarded by each network or association are selected by a scholarship committee created by the Board. Groups must use Reviewr.com as the portal for receiving applications and awarding scholarships. UHAAF will set up the scholarship with the group's criteria for the award, and the chapter will select recipients. This is the great part of what we do at the Alumni Association as every scholarship matters for our students.

After a recipient is selected, the network or association must inform the UH Alumni Association liaison so the student can be verified and officially accept the scholarship. Funds will be distributed by UH Office of Scholarships and Financial Aid in August for the Fall Semester and January for the Spring Semester.

UHAAF will provide each chapter with a status report on their respective endowment or operating budget scholarship. During the year, a network or association may request information about their scholarship through UHAAF.

Scholarship Timeline:

- **October** – Gather information on scholarship committees.
- **November** – Make necessary updates to scholarship criteria and application.

- **December** – Contact committee members and send timeline/directions for Reviewr.
- **January** – Application portal opens.
- **March** – Applications close.
- **April** – Committees review applications and select winners.
- **May** – Applicants are informed of scholarship decision.
- **June** – Check cut and delivered to Student Financial Aid.

EVENT PLANNING

Planning is the key to any successful event. When you begin to plan your event, contact the UHAAF to reserve the date. We do want to attend and support as many events as possible, so letting us know in advance helps us coordinate. We are here to support you and can help create an event registration link, promote your event through our website and emails and collect fees and donations.

To make sure you receive the full benefit of our event marketing and support, we ask that you let us know your event plans at least six weeks in advance of your event.

EVENT TYPES

- **Athletic Support**
  Host a tailgate or watch party in support of University of Houston Athletics. Can also be another athletic themed event. If you need contacts for local areas to host watch parties, please reach out.

- **Community Service**
  Consider ways to give back to the surrounding community through service. Many local organizations would love to receive help from a group of hard-working volunteers. Examples include the Food Bank, Wreaths Across America or the Ronald McDonald charity.

- **Student Engagement**
  Supporting College initiatives, funding scholarships and meeting the students (virtual or otherwise) or participating in activities that have a positive impact on students is welcomed.

- **Networking/Professional Development**
  Host speakers or events that serve as networking opportunities for your members. These can include career fairs or networking events.

- **Collaboration**
  We believe it is great to collaborate with other alumni associations. This can help with resources, manpower and overall event impact on our alumni. This can include collaborating with other UH Alumni Associations, other Texas Alumni Associations, etc.

- **Signature Event**
  The primary purpose of a Signature Event is to show your impact to the community at large and the pride of publicly coming together as your alumni cohort. The signature event should also focus on trying to connect students with alumni in some way.

EVENT TIMELINE

6 Months Prior to Event

- Recruit committee/volunteers for event.
- Set target audience.
- Set budget (in consultation with network or association leadership).
- Secure date and venue.
- Determine program format.
- Request speaker, if needed.

3 Months Prior to Event

- Confirm event details.
  - Venue
  - Caterer
  - Keynote Speaker
  - Entertainment

8 Weeks Prior to Event

- Complete marketing plan (emails, social posts, event page, etc.).

6 Weeks Prior to Event

- Start promoting event.
- Finalize volunteer duties and logistics for the event.

2 Weeks Prior to Event

- Promote through various channels.
- Start gathering final numbers for catering and other relevant parties.
- Confirm event logistics and day-of timeline with the Board.
- Gather last-minute information – Bios, speaking points, introductions, etc.

Event Day

- Smile, you made it! Also, a happy smile can make your guests feel welcomed and appreciated.
- Have membership information available for any curious parties.
- Have all alumni check-in or sign in for the event.

After Your Event

- Upload photos to Alumni Flickr site.
- Consider sending a post-event email or survey to thank attendees for joining. Their feedback is valuable in moving forward.
- Discuss areas of improvement and success with Board members.
- Make sure all reimbursements and payments are submitted to be completed.
- Report your event numbers to the UH Alumni Association.
- Thank vendors, sponsors and volunteers!

ALUMNI EMAILS

Communication with alumni is crucial to the growth of UHAAF. It is important that we follow timelines and standards for the University when it comes to sending alumni emails. The groups must follow specific communication guidelines and policies by University of Houston Advancement and Alumni.

UHAAF sends out newsletters once a month. By keeping an updated event calendar and updating UHAAF, your events will be included in this communication. Additional emails may be sent to specific groups of alumni (Bauer alumni, alumni who graduated in the last 10 years, alumni who live in the San Antonio area), with two-week advance notice, based on approvals..

Email policies

Sending emails through the UHAAF allows for consistent branding and follows best practices.

ENDORSEMENT POLICY

The UHAAF and its groups do not endorse, contribute to, work for, or otherwise support or oppose any electoral candidates for advocacy groups. The UH Alumni stance is to encourage broad participation in the electoral process and to treat all candidates with equal respect and avoid influencing voters. Remaining neutral is important to maintaining the UHAAF image.

UH LINK

UH alumni have the opportunity to engage with each other and leverage their network through the online alumni platform, UH Link. Formerly known as CoogsConnect, UH Link provides spaces for Affiliated Alumni Associations and Networks to engage directly with their members. The features that can be taken advantage of include:

- **Group Newsfeed**
  Dedicated newsfeed where Group members can post about news, events and more.

- **Members Tab**
  Area where Group members can search for one another by name or filter by specific category.

- **Photos Tab**
  Area that contains collection of photos and albums posted by a particular Group.

- **Events Tab**
  Area that contains listing of Group events by date.

Affiliated Alumni Associations with Premium Groups get access to additional features. Premium Groups have their own Jobs Tab exclusive to their members, allowing applicants to find the positions that are most relevant to their line of work. Premium Group members can also utilize the Resources Tab where they'll find information, links, videos or other assets to explore. Additionally, Affiliated Alumni Associations with Premium Groups can create Subgroups-Groups within a Group. Subgroups allow members from a specific program, school or club to connect with each other on an even more exclusive level.

SOCIAL MEDIA

Social media is an amazing tool to stay connected with your members, recruit new members and publicize your events. The key to effective social media is to post consistently and frequently to maintain a presence in your members' minds but not so much that they feel overwhelmed. A conversational tone is also an important way to make your posts relatable.

The official UHAAF hashtag is #ForeverCoog. Please use that with any posts you make on the different platforms. You can also use a hashtag specific to your network or association or event. You can also use #GoCoogs, game-specific hashtags, or other UH hashtags when relevant.

We also ask that you make UHAAF a page administrator and provide access to our social media team. This allows us to ensure brand uniformity and consistency while having an extra set of eyes to monitor the page. This also helps with the transition of new leaders to those social media accounts.

We recommend that your social media accounts be named "UH (Insert Name) Alumni Association and Networks" or something similar based on restrictions. Your network or association can utilize Facebook, Twitter, Instagram, LinkedIn, etc.

Facebook Tips:

- When creating a Facebook Page for your network or association, we recommend creating a page and not a group. Pages are publicly accessible to anyone, which can increase engagement. Groups, on the other hand, require people to ask to join and require more moderation from group administration.

- If you already have a group, think about creating a page and transition your members to the page.

- Please note that it's against Facebook's terms of service to set up a personal account rather than a page.

- Make sure your page likes/follows the official UHAAF, the main UH page and other group pages. Share content from these pages when relevant to your network or association.

- Experiment with Facebook Live feeds at events, but be aware of any inappropriate behavior or language that may occur during streaming.

- Post consistently to keep followers engaged and informed.

- Use photo and videos whenever possible with posts to attract more attention in your followers' newsfeeds.

- Create events on Facebook for any meetings, events, watch parties, etc. This allows you to invite current and prospective members and serves as another way to remind guests of an upcoming event. Link registration in event pages so people can easily register.

- Make sure that someone from the network or association monitors spam posts and inappropriate content and that someone is responding to questions and comments.

Twitter

- If someone mentions your network or association on Twitter, follow the account once you determine it is a "real" account.

- Follow and retweet official University-related accounts such as the UHAAF account, UH, UH Athletics, Colleges, etc.

- Be sure to tag relevant accounts with the @ when mentioning them in your post.

- Use hashtags and watch trending topics for opportunities to engage with a wider audience.

- Remember that Twitter lends itself to conversations. Engage with those who comment or retweet your content. Make sure someone is responding to any direct messages as well.

- You can post much more frequently here than Facebook. Posting your contact more than once helps ensure that it doesn't get missed as easily.

Instagram:

- This platform, more than others, is driven by photo content so think about visually appealing ways to share content. It is also a good idea for the group's handle to mimic their Twitter handle.

- Post frequency should be like Facebook, generally no more than twice a day.

- Follow all relevant University of Houston accounts and tag them when it makes sense.

- Use hashtags and watch trending topics for opportunities to engage with a wider audience.

- Utilize Instagram stories for events, links and other engagements.

LinkedIn:

- This platform is best used for networking and professional development. It is a great place to celebrate professional success of members and alumni. This can also be used to create connections among alumni.

- Post frequency should be like Facebook, generally no more than twice per day.

- Follow all relevant accounts and tag them when it makes sense.

- Use keywords in your page description to help alumni find your page.

- Follow relevant hashtags to broaden the scope of shareable content.

SOCIAL MEDIA GUIDELINES

Remember, anything you post will reflect not only on your network or association, but also on UHAAF and the University. With that in mind, review the UH Alumni Association social media policies. Below are some guidelines.

Tips:

- Promote your events and meetings. Share photos and videos.

- Highlight alumni in your area.

- Share UHAAF, the University and System news and events.

- Monitor the accounts and remove spam posts as needed.

- Protect yourself. Be careful about sharing personal information online.

- Act responsibly and ethically. When participating in online communities, do not misrepresent yourself on behalf of the network or association.

- We will not tolerate discrimination (including age, sex, race, color, creed, religion, ethnicity, sexual orientation, gender identity, national origin, citizenship, disability, marital status or any other legally recognized protected basis under federal, state or local laws, regulations or ordinances).

- Contact us when needed. If you receive a question, please reach out and we will find the answer.

- Look out for spam accounts. The following can be signs of a spam account:

  - Length of time on the site - fake accounts tend to be relatively new

  - Inappropriate pictures

  - Fake or incomplete names

  - Lack of detailed information

  - Failure to answer registration questions

  - Sheer number of groups they follow or the kind of groups they follow-if they try to join every single alumni network or association they can, that's usually a sign that they're not actually tied to any

  - Review the friends/following list for any additional clues - members in common? Do they seem to have only fake-looking accounts as followers?

BRAND GUIDELINES

The University of Houston is a renowned public research institution surrounded by global influencers in art, culture and commerce in one of the nation's largest cities. We are fearlessly driven toward a bold, innovative approach to education, research and problem-solving as we work to improve the lives of those we serve, whether that means adhering to longstanding tradition or challenging the status quo. Enriched by one of the nation's most diverse populations, we proudly serve tens of thousands of tenacious undergraduate, graduate and doctorate-seeking students.

There are specific guidelines that all groups must follow to ensure consistency of the University of Houston brand throughout the country with respect to copyright and trademark rules. Each network or association will have their own logo created by UHAAF and is available upon request. Please do not make a different logo for your network or association. Using the official logo also connects you to the UHAA.

The Logos

UHAAF has its own logo that can be used. The logo is different than the network or association logos. UHAA falls under the University and is updated with the proper UH approved logo. The network or association logos are under the UHAAF as Legacy logos and are able to use the thin interlocking UH.

Under no circumstances may anyone change the colors of the logo. Each network or association will have versions of its logo suitable for full-color and single-color use, as well as a version to use on dark or black backgrounds.

Do not alter the logo in any way such as adding or removing items, changing the spacing between elements, changing the font or adding any sort of shading or shadow.

Primary Brand Colors

RED
RGB: 200-16-46
CMYK: 0-100-81-4
PMS 186 C
HEX: #C8102E

TEAL
RGB: 0-179-136
CMYK: 84-0-59-0
PMS 339 C
HEX: #00B388

GOLD
RGB: 246-190-0
CMYK: 0-29-100-0
PMS 7408 C
HEX: #F6BE00

GRAY
RGB: 136-139-141
CMYK: 26-16-13-46
PMS COOL GRAY 8 C
HEX: #888B8D

Secondary Brand Colors

BRICK
RGB: 150-12-34
CMYK: 8-97-76-31
PMS 704 C
HEX: #960C22E

GREEN
RGB: 0-134-108
CMYK: 100-10-61-38
PMS 328 C
HEX: #00866C

MUSTARD
RGB: 246-190-0
CMYK: 0-29-100-0
PMS 7408 C
HEX: #F6BE00

SLATE
RGB: 84-88-90
CMYK: 45-29-26-76
PMS 425 C
HEX: #54585A

Tertiary Brand Colors

CHOCOLATE
RGB: 100-8-23
CMYK: 26-85-85-72
PMS 490 C
HEX: #640817

FOREST
RGB: 0-89-80
CMYK: 95-25-70-68
PMS 3305 C
HEX: #005950

OCHER
RGB: 185-120-0
CMYK: 9-35-98-30
PMS 1245 C
HEX: #B97800

BLACK
RGB: 0-0-0
CMYK: 0-0-0-100
PMS BLACK
HEX: #000000

Typography

- **Headline:** League Gothic is the headline font in the University of Houston's brand and should be used for big typographic moments.

LEAGUE GOTHIC REGULAR

- **Secondary:** Milo is the typeface suitable for subheads, pull quotes, title pages and instances where legibility must be immediate, such as billboards.

Milo Extralight
Milo Extralight Italic
Milo Regular
Milo Italic
Milo Bold
Milo Bold Italic
Milo Black
Milo Black Italic

- **Body:** Crimson is the primary supporting typeface for the UH brand. It is suitable for use in body copy and subheads.

Crimson Regular
Crimson Italic
Crimson Semibold
Crimson Semibold Italic
Crimson Bold
Crimson Bold Italic

ONLINE RESOURCES

- UH Alumni Association Leadership Guide
- Event Planning Timeline
- Event Planning Worksheet
- Branding Guidelines
- Network or Association Website
- Sample By-laws
- Logos

APPENDIX A

Alumni Association
UNIVERSITY OF **HOUSTON**

THE UNIVERSITY OF HOUSTON ALUMNI ASSOCIATION FOUNDATION AFFILIATED ALUMNI ASSOCIATION AND NETWORK BYLAWS

The effective date of these bylaws for any Affiliated Alumni Association and Network is fiscal year beginning September 1, 2022.

Section 1. An alumni association of any college, school, department, special interest network or association or or networks of special interests or geographic area shall be eligible to be an Affiliated Alumni Association or Network, herinafter called "Association or Network".

Section 2. Alumni residing or working in an area where there is a concentration of University of Houston alumni may form a geographically based Alumni Network.

Section 3.
a. A network or association of alumni may express interest in forming a new Association or Network. Expression of interest is shown by contacting the UHAA. A committee of the UHAA Foundation Board will determine viability of the network or association based on the number of alumni that would align, could potentially be engaged and to ensure that a similar network or association does not already exist.

b. A new Association or Network may be recognized so long as the steps below are followed.

Section 4. Such petitioners shall submit an application on forms provided by the UHAA and conduct an event or gathering that demonstrates interest. At least twenty-five (25) alumni must respond or attend the gathering. This event will help ensure clarity of the mission and sustainability of the network or association. The petitioners must describe the purpose of their proposed Association or Networkin a letter to the UHAA, and must include a description of the interest gathering event. UHAA will provide a bylaw template to the petitioners. The petitioner's file containing evidence of the event and proposed by-laws will be submitted to the UHAA. UHAA will submit the vetted petitioner's file to the Constituent Relations Committee for review.

a. Upon completion of the review of the petitioner's file, if the majority of the Committee approves, the Association or Network will be presented to the Board of Directors for approval.

b. The Board of Directors may institute a new Alumni Association or Network of The UHAA Foundation by a 2/3 majority vote of Board members present, participating by phone, voting by proxy and assuming there is a quorum.

c. Any subsequent amendments to the Association or Network's Bylaws may be subject to the Foundation's annual review process of bylaws and reviewed to ensure that bylaws align with the University's strategy.

Section 5. Upon approval by the Board of Directors of the Foundation, the petitioners shall elect officers and directors in accordance with its Bylaws and notice of such elected person shall be given to the Secretary of the Foundation.

Section 6. Each Association or Network is responsible for the financing of its own functions and shall have the flexibility to design suitable and appropriate procedures for the officers and members of the said association or network, so long as they are not inconsistent with the Foundation Bylaws or policies deem suitable.

Section 7. The administrative year and the fiscal year of all Alumni Associations and Networks shall coincide with that of the Foundation.

Section 8. Any Association or Network legally constituted at the adoption of these Bylaws shall continue to be recognized as the only representative of the specified college, school or department, interest network or geographic area that it has represented previously. If a department or school within a college requests to form an Association or Network, they will be directed to form as a subsidiary of the approved Association or Network. The chair of any affiliated network or association shall be on the Executive Committee of the approved Association or Network. The subsidiary will have some flexibility in programming as long as the bylaws of the Association or Network are followed.

Section 9. The Board of Directors may cease to recognize a Association or Network at any time when in the best interest of the Foundation. Such action is deemed necessary following a recommendation to that effect by the President and, if it is a college, school or department based Association or Network a request by the dean to do so by a two-thirds (2/3) vote of directors present at any regular or special meeting called for such purpose provided notice of such meeting shall specify such purpose.

Section 10. Annual elections of the Members of the Executive Committee shall occur and the meeting shall be announced in advance. Alumni are allowed to provide additional nominations for consideration. It is recommended that annual elections take place by August 31 of each year.

Section 11. The Members of the Executive Committee of the Association or Network shall be the President, Vice President, Secretary, Treasurer and Immediate Past President. Any other officers may be added as deemed necessary. A vacancy in the office of President shall be filled by the Vice President. Each Executive Committee Member is entitled to one (1) vote and must be present or participating by phone to exercise their vote or vote by proxy.

Section 12. The President of the Association or Network shall serve as the principal officer of the constituent alumni association and shall supervise and control all of the business affairs. He or she will preside at all meetings of the members.

Section 13. The term for any specific position on the Executive Committee is one (1) year with the opportunity to serve two (2) consecutive terms. Volunteers can serve in multiple Executive Committee positions as long as the terms do not overlap.

Section 14. Any Member of the Executive Committee or Committee Chair of the Association or Network may be removed from his or her position for conduct unbecoming of a board member that does not align with the strategic direction of the University at any meeting as long as notice of intention is provided in advance.

Section 15. All Members of the Executive Committee and Committee Chairs of the Association or Network shall follow the same policies outlined by the UHAA Foundation Board of Directors. These include:

a. Association or Network Relationship Policy
b. Conflict of Interest Policy and Disclosure Form
d. UHAA Foundation Asset Procurement and Management policy for assets over $1000

Section 16. Any amendments to this document must be written and approved by the President of the UHAA Foundation Board of Directors and the AVP for Alumni Relations.

_____   _____

Michael Sachs ('97)   Date
President, UH Alumni Association Foundation
Board of Directors

_____   _____

(Name)   Date
Constituent Alumni Association

_____   _____

Mike Pede ('89)   Date
Associate Vice President, Alumni Relations

APPENDIX B

ALUMNI ASSOCIATION AND NETWORK
ANNUAL AGREEMENT

OVERVIEW

Associations and Networksand its volunteers provide an integral channel for engaging alumni through programming, relationships and outreach. Alumni Associations and Networks are subsidiaries of the UHAA Foundation Board. The staff's role is to provide support and strategy to strengthen the network or association and program implementation.

This document will provide a summary of the procedures, expectations and division of responsibilities for the 2021-2022 academic year. Each year a similar document will be developed and shared with the President of each Associations and Networks

A. BANNER AWARDS

Section 1. Banner awards will continue for the 2022-2023 academic year. The period of time considered when determining eligibility for the banner awards begins August 1st, 2022 through July 15th, 2023 (unless otherwise agreed upon in advance). Funds will appear in your account prior to the start of FY24 (September 1st, 2023)

Section 2. All administrative functions must be complete in order to qualify. This includes a submission of a roster of volunteers, their roles and contact information and submission of meeting minutes.

- Submission of attendee lists for ALL events
- Signature Event
- Student Support (scholarships, mentoring, programming)
- Support of Athletics
- Community Service
- Networking

Section 3. The payout amounts are:

- Platinum - $2,500 -6/6
- Red - $1,250 – 4/6
- White - $750 – 2/6

B. FINANCIALS

Each Associations and Networks is expected to be financially self-sufficient.

Section 1 – Budgets

Each Associations and Networks must keep a positive balance in their account. If a network or association falls into the red (without explanation or discussion with the UHAA regarding a plan to erase the deficit), funds may become inaccessible until the negative balance is corrected.

Section 2- Reimbursements

The Treasurer will submit the Check Authorization form. Additionally, approval must be provided for each expense

by two members of the Executive Committee. The person submitting the expense cannot also provide approval as they are the beneficiary. Itemized receipts along, with the purpose of the expense, must accompany the check authorization form. Requests submitted before 11 a.m. on Tuesday shall have their check available for pick up on Friday of that week (or will be mailed, if preferred).

Section 3- Financial Reporting

The President and Treasurer of each Constituent Association will receive monthly financials with a rolling two-month delay (ex. Finances as of May 31st would be received on August 10th). The President and Treasurer will review documents to ensure that everything is reflected correctly. Any concerns should be brought to their point of contact at the UH Alumni Association.

Section 4 – Assets

Associations and Networks **MUST SECURE PRIOR APPROVAL BEFORE** purchasing an asset over the value of $1,000. This includes but is not limited to: trailers, vehicles and electronics. All assets are ultimately the responsibility of the UH Alumni Association Foundation and are covered underneath UHAA Foundation's insurance. Additionally, if a bulk order is placed, a plan for storage and inventory management must be discussed.

New for 2022-2023: Constituent Groups are required to provide a list of Association held assets that have a purchased value of $250 and above, annually. This list must include the asset, purchase documentation (receipt, paid invoice, donation of asset/GIK documentation, etc.), and physical location of the item. If the item is being stored off UH property, then an asset possession agreement must be on file with UHAA that dictates storage location, security of the item, and return of asset procedure if the holder vacates their position within the Alumni Association/Alumni Organization.

Section 5- Contracts

If a contract is developed for a Associations and Networks program, the contract **MUST** be signed by the UHAA President or Associate Vice President and you **MUST SECURE PRIOR APPROVAL IN ADVANCE**. It is always recommended that a contract be developed to ensure clear communication regarding cost and deliverables for all large-scale programs. This is to limit personal liability of any board member.

Section 6 – Program Sponsorship

Sponsorship dollars may be secured in support of programming. Your UH AA contact will assist with the development of the sponsorship packet which will include the sponsor levels, associated benefits, establish the fair market value (FMV) and appeal code (which help ensure funds are deposited in the correct account). It is important that all value for Sponsorships are included in the FMV evaluation, and any professional marketing of sponsorships be coordinated with the UH Marketing department.

Section 7 – Deficit Spending

If deficit spending occurs, a freeze will be placed on all assets until a solution is identified and agreed upon by the UHAA Foundation Executive Committee.

C. VOLUNTEERS

Section 1. Volunteers may only serve on the Executive Committee of one Associations and Networks (est. September 2018) unless approval has been given by the UHAA Foundation Leadership – the UHAA AVP and the President of the UH Alumni Association Foundation.

Section 2. UHAA Staff and Association/Network volunteers collaborate to identify, cultivate and train new volunteers.

Section 3. Any Executive Committee member may be removed from his or her position for conduct unbecoming of a board member that does not align with the strategic direction of the University at any meeting, special or regular, if notice of intention of the purpose of removing the volunteer is one of the stated purposes for calling the meeting.

Section 4. Any prospective alumni association derived from a department within a college must align and fall under that college's alumni association. They must be approved by their respective college alumni association.

D. SCHOLARSHIPS

Each fall the scholarship timeline is shared with all Associations and Networks. The deadlines outlined need to be followed in order to ensure that funds are deposited in student accounts in time.

Section 1. No full-time or part-time UH faculty or UH staff member is allowed to select restricted scholarship recipients.

Section 2. A scholarship committee must be identified, a selection rubric established and scholarship criteria must be clearly outlined from the outset. Anyone who has a possible conflict of interest must recuse themselves from the selection process.

E. EVENTS

Section 1. In order to properly market an event, they should be scheduled AT LEAST six weeks in advance. This will allow proper communication to your audience. If you are unable to schedule an event six weeks in advance, please be advised that the support the UHAA will be able to provide may be limited due to approval timelines and events not approved will be subject to non-reimbursement for event expenses.

Section 2. Submit the UHAA Event Intake Form to your point of contact no later than six weeks ahead of time. If you need a generic graphic, please submit the request no later than eight weeks before the event.

Section 3. If your event has a cost associated with it, you must disclose the Fair Market Value of each ticket/sponsorship to the UH Alumni Association before your event page can go live. This is in conjunction with the Gift Office to ensure that the people attending your event receive the proper gift credit. The FMV must be determined and approved prior to an Appeal Code or event marketing can occur.

Section 4. If a Association or Network is using a logo, or image, to produce collateral, marketing materials, promotional items, shirts, etc., prior approval must be provided by UH Branding. All images to be used must be submitted to the UHAA liaison for submission to the UH Branding Office. The UHAA liaison will be the primary communicator with the Branding Office and groups are not to contact Branding directly.

Section 5. Please route all official UHAA requests for the President, Deans and Vice Presidents through your UHAA Staff liaison and do not contact their offices directly.

F. DATA, TRACKING & REPORTING

Section 1 – Data
The UHAA can request data in support of Associations and Networks efforts. However, due to privacy and University rules, data cannot be shared publicly. The UHAA can help with communicating and with outreach on your behalf. If any Association or Network receives updated alumni contact information, please share it with your UHAA contact and

they can update the University database. Shadow databases and websites are not allowed.

Section 2 – Attendee Lists

Scanning alumni cards on site at each event is the preferred tracking method. When that is not feasible, attendee lists from each event must be submitted within 10 days of the event. A check-in document template will be provided by the UHAA. This will help ensure that the proper information is captured when a UHAA staff member is not in attendance. A typed attendee list is preferred to ensure legibility, but written will be accepted.

Section 3 – Reporting

Each month each Association or Network will receive financials, progress toward the Banner Awards, progress toward the Life Membership Initiative and a list of possible volunteers.

G. PRESIDENTS' COUNCIL

Section 1. Presidents' Council meetings take place at least six times each year to update the Associations and Networks on news, events and programming at UH. It also gives the Associations and Networks a chance to network and discuss best practices. The timing and frequency of the meetings will be determined by the members of the President's Council annually, with the approval of the UHAA liaison responsible for facilitating these meetings.

Section 2. One member of the Presidents' Council is elected to serve a two-year term as a non-voting ex-officio member of the UHAA Foundation Board of Directors. The person elected to serve in this capacity will also serve as the President of the Presidents' Council. If the President is unable to attend, they must send a representative in their place to attend the meeting.

Section 3. Each Association or Network must have at least one representative at each Presidents' Council. If no one is able to attend, the President of the Presidents' Council must be notified in advance. Calls will be set up with Regional Alumni Association's to go over what was discussed and to provide any materials that were handed out.

Section 4. In the instance of a vote, each Association or Network is allowed one vote regardless of the number of volunteers attending the meeting.

H. WHAT THE UH ALUMNI ASSOCIATION AND THE UH ALUMNI ASSOCIATION FOUNDATION DOES FOR YOU:

Section 1. Your constituent association falls under the UHAA Foundation 501(c)3. As a result, tax-free purchases can be made on your behalf for pre-approved expenses.

Section 2. The UHAA Foundation also provides event insurance for all of your programs. Please note that we must have an annual listing of board members, annual calendar of events and anticipated budget to be considered an active and covered network or association. We also provide insurance for assets purchased through your Association's or Network's funds
(either purchased outright, or reimbursed to an Association or Network member) but disclosure protocols – located in Policy C: Financials, section 4: Assets – must be followed for this coverage to occur.

Section 3. The UHAA Foundation also conducts an annual audit which includes your constituent group's financials and files annual tax documents.

Section 4. We will provide website and social media presence under the UHAA website and Facebook and any additional social media platforms that the UHAA has a presence. Additionally, we will provide communication support via email (newsletters and targeted emails).

Section 5. An annual financial incentive will be offered through the Banner Program. If appropriate, funds will be deposited directly in your account.

Section 6. The UHAA will offer event consultation and staff support at many of your events and board meetings.

Section 7. The UHAA will provide at least one stand-alone email for your signature event assuming content is provided according to the timeline outlined above.

Section 8. We can connect you to the UHAA's corporate partners to work with budget-friendly businesses and venues.

Section 9. The rental fee for the board rooms and event space at the Alumni Center will be waived for recognized affiliated associations and network approved events. Rooms are booked on a first come first served basis and every rental must follow the rules of the venue pertaining to serving alcohol, security and parking.

_____   _____

Michael Sachs ('97)   Date
President, UH Alumni Association Foundation
Board of Directors

_____   _____

(Name)   Date
Constituent Alumni Association

_____   _____

Mike Pede ('89)   Date
Associate Vice President, Alumni Relations

APPENDIX C

The University of Houston Alumni | Association Foundation | Board of Directors Conflict of Interest Policy

Adopted November 19, 2008 (Sept. 15, 2017)

Code of Conduct and Compliance with the Policy on Conflict of Interest for the University of Houston Alumni Association Foundation Board and all Associations and Networks (UH Alumni Association Foundation)

(Amended Sept. 15, 2017)

CODE OF CONDUCT

Purpose and Scope:

UHAA Foundation board members have a responsibility to maintain high institutional and personal standards in the performance of their official duties. This document outlines the standards of conduct that must be met by all members engaged in any activity related to the purchasing or contracting of goods or services for the UHAA Foundation, regardless of the funding source.

Policy Statement:

Board members shall not participate in the selection of a vendor or the award or administration of any contract or purchase if a real or apparent conflict of interest would be involved. Such a conflict would exist when the board member or any member of his or her immediate family has a financial or other interest in the firm otherwise eligible for the procurement actions, and that interest would result in personal benefit to the board member or family member.

Board members shall neither solicit nor accept any gift, favor, privilege, benefit, service, exemption or thing of value from any vendor, contractor or party to a sub agreement that would result in personal benefit and/or that could influence the members' official conduct.

Any attempt to realize personal gain through conduct inconsistent with the proper discharge of a board member's duties is a breach of the public trust and will subject the member to disciplinary action.

Definitions:

a. **Benefit:** Anything reasonably regarded as providing monetary gain or advantage.

b. **Conflict of Interest:** A situation in which there is a divergence between the member's private interests and the member's professional obligations to the UHAA Foundation such that an independent observer might reasonably question whether the member's actions or decisions are determined by consideration of private gain, financial or otherwise.

c. **Financial relationship:** Includes paid consulting or other contract work, ownership or investment such that the relationship accrues a financial benefit to the board member or family member – both direct and substantial.

d.Immediate family: Includes the following related to board member and/or spouse or significant partner - Child (adopted, step- and foster children and natural sons and daughters), parent, spouse, sister, brother, grandchild, grandparent.

e.Procurement or purchasing activities: Approvals, disapprovals or recommendations concerning a procurement transaction; preparation or any part of procurement actions; influencing the content of any specification or procurement standard; and acting in an advisory capacity including rendering of advice, investigation or auditing in any procurement activity.

CONFLICT OF INTEREST

Conflict of Interest is defined as a conflict between a board member's responsibilities to the UHAA Foundation and his or her own personal interest. This includes Ex Officio Members.

No Board member shall:

• Seek or accept any privilege, benefit or thing of value for exercising his/her powers as a board member, except as allowed by law.

• Accept any privilege, benefit or thing of value that might influence them in their duties as a board member.

• Use his/her position to get special privileges or exemptions for him/herself, except as allowed by law.

• Become an officer, agent, employee, member or own interest in an organization that might lead him/her to disclose confidential information.

• Disclose confidential information obtained through his/her Board position for personal gain or benefit.

• Conduct business for the Board with any entity of which he/she is an officer, agent, employee, member or significant owner.

• Make personal investments in any enterprise that creates a substantial conflict between his/her private and UH Alumni Association Foundation interests.

• Accept other employment that might impair his/her independence of judgment in performing duties.

• Receive compensation for services to UHAA Foundation, except as allowed by law.

• Solicit, accept or agree to accept any benefit from a person/entity financially interested in transactions he/she is responsible for, such as contracts, purchases, payments, claims or other financial transactions.

ANNUAL CERTIFICATION

1. On an annual basis, all UHAA Foundation Board Members (including Associations and Networks Members and Ex Officio Members) shall complete an Annual Certification for Code of Conduct and Compliance with the Policy on Conflict of Interest by signing below.

2. All board members shall promptly disclose to the Board President and President Elect any substantial information regarding what they believe to constitute a violation of this document or any law.

Will you be purchasing, or recommending or approving the purchase of, goods or services for UH Alumni Association Foundation from an entity with which you or a family member are an officer, agent, employees or member or with which you or a family member have a direct or indirect financial or other interest?

NO _____   **YES** _____   If yes, please explain.

By signing below, you acknowledge you have reviewed the Code of Conduct and Compliance with the Policy on Conflict of Interest (as included above) and understand your responsibilities.

Board Member Acknowledgement:

_____   _____   _____

Printed Name   Signature   Date

AFFILIATED ALUMNI ASSOCIATION AND NETWORK LIAISONS

TAYLOR SANTANA-ROULEAU

Austin Alumni Network

Black Alumni Network

College of Education Alumni Association

College of Engineering Alumni Association

Communications and Disorders
Alumni Association

Cougars Athletic Alliance

DC Alumni Network

Denver Alumni Network

Eta Mu Alumni Network

First Generation Alumni Network

Fort Bend Alumni Network

Frontier Fiesta Alumni Network

GCSW Alumni Association

Hispanic Alumni Network

LGBTQ Alumni Network

Los Angeles Alumni Network

New York City Alumni Network

Pakistani Alumni Network

Young Alumni Network

CABINA WOODS

Asian Alumni Network

Bauer Alumni Association

CenterPoint Alumni Network

College of Architecture and Design
Alumni Association

College of Natural Sciences and Mathematics
Alumni Association

Conrad N. Hilton Alumni Association

Dallas Fort Worth Alumni Network

Delta Upsilon Alumni Network

Earth and Atmospheric Sciences Alumni Network

Eta Lambda Alumni Network

Katy Alumni Network

Hobby School of Public Affairs Alumni Association

Nursing Alumni Association

Rio Grande Valley Alumni Network

San Antonio Alumni Network

Sigma Nu Alumni Network

Spirit of Houston Alumni Network

Tau Kappa Epsilon Alumni Network

UH Graphic Alliance Partnership

Valenti Alumni Association

GROUP CONTRACT CHECKLIST

DEFINITIONS

1. UHAAF is a 501(c)(3) established to closely partner with the university by providing advice, advocacy, and outreach, on behalf of the University and the alumni relations program. The foundation provides oversight of the board, the affiliated alumni associations/networks, scholarships, Life Membership, affinity, and corporate partnerships, as well as legislative advocacy.

2. UH is a state university within the University of Houston System

3. UH Alumni Relations is a program focused on alumni engagement within the Division of Advancement and Alumni at the University of Houston. It is often referred to as UHAA or UH Alumni Association.

PREAMBLE

TThis is a contract between the _____ Alumni Association/Network and the University of Houston Alumni Association Foundation for 2024-2025. It conveys the respective responsibilities, obligations, and opportunities for collaboration. The University of Houston appreciates the affiliated alumni programs to foster the relationship with its alumni by providing activities, services, and programs.

This is what UHAAF provides for each affiliated alumni association/network annually:

o Provide funds for reimbursement of requested Alumni Association events

o Provide monthly financial reports (w/ two-month delay)

o Support for sponsorship packets

o Provide alumni data, to assist in communication and outreach

o Invitations to President's Council for periods of 4 times a year

This is what _____ Alumni Association/Network commits to doing the following checked items:

o Submit annual budget by September 1st, 2024

o Keep a positive balance in its financial account

o Secure approval of purchasing an item >$1000

o Secure signature approval from UHAAF of any contract

o Secure approval from UHAAF for any individual to be on more than one affiliated alumni association network

o Use UH Link as a method to increase affiliated alumni members

o Aligning with strategic direction of the University in all meetings

o Serving the needs of the _____ College

o Identify a scholarship committee w/o any paid university employees

o Provide an annual summary of activities and metrics

o Secure approval from UHAAF for any event

o Update UH database with any new contact information on alumni

UH Alumni Relations will provide:

o Assistance with tax free purchases

o Provides event insurance

o Conducts an annual audit

o Provides website and social media presence under the UHAAF website

o Event consultation and standing alumni email for annual signature event

o Waive board room & event space rental fees at the Alumni Center

I have read and agree to follow the terms set forth in this contract with UHAAF.

_____   _____

President   Date
_____ Alumni Association/Network

_____   _____

Michael Sachs ('97)   Date
President, UH Alumni Association Foundation
Board of Directors