

What is a UofL Alumni Chapter?

A chapter is a geographically based alumni group. To see a list of current chapters go to the website below.

<http://www.uoflalumni.org/s/1157/site2014/index.aspx?sid=1157&gid=1&pgid=4011>

What is a UofL Alumni Council?

A council is an academic or affinity based alumni group.

Alumni Chapters and Councils Initiatives:

- Keep alumni around the world connected to the University of Louisville
- Identify leadership within each chapter or council
- Provide a means for alumni, fans, and friends of the university to connect
- Facilitate awareness and advance the interests of the University of Louisville
- Plan social events and provide opportunities for alumni, fans, and friends of the university
- Assist the University of Louisville Alumni Association in collecting updated alumni records
- Promote and participate in the university's philanthropic initiatives, such as Day of Giving
- Inform the local communities about current events at the University of Louisville
Ex. Serve as an ambassador for the university by sharing positive stories and statistics
- Assist the university with recruitment initiatives by serving as a point of contact for your area and/or college or school

Looking to start an Alumni Chapter or Alumni Council

We are always looking to extend our network of alumni. First, check to make sure that the chapter or council you want to start does not already exist.

- **To start an alumni chapter email elise.buck@louisville.edu to inform the office of your interest.**
- To get involved with an already established alumni chapter or council email the contact listed on their chapter page on UofLalumni.org's website.

Office of Alumni Relations and Annual Giving Support

The Office of Alumni Relations and Annual Giving will offer support to chapters and councils in a number of ways.

- **Event and Strategic Planning** – Create a strategic plan and brainstorm ideas for events and best practices

- **Email Communication** – Schedule targeted emails for chapter/council events and opportunities – Please use the project from (Names and phone numbers can be provided upon request; however, due to university policy we cannot release email addresses)
 - <http://uoflalumni.org/chaptereventform>
- **Webpage Management** – Each chapter/council will receive a webpage off the UofL alumni website, www.uoflalumni.org. Chapter/council leadership must regularly monitor websites. Please inform us of any updates or material that needs to be added to the site
- **UofL Branded Supplies** – Nametags and UofL Alumni branded items (at cost) are available upon request.
- **Financial Support and Management** – The Alumni Relations and Annual Giving office maintains all chapter/council bank accounts. As a gesture for complying with our financial policies, the Alumni Association provides a \$500 yearly allotment to chapter/councils. Quarterly financial reports will be provided

Leadership Training and Development

At various times throughout the year, your Alumni Office representative will host conference calls and provide university updates via email, social media and/or newsletter. If your chapter/council is doing something unique or outstanding, please let us know so we can share with and inspire other groups.

We encourage all chapter and council leaders to attend our annual Alumni Leadership Conference.

Leadership Minimum Standards

The Office of Alumni Relations and Annual Giving request that all alumni chapters and councils meet the following requirements in order to maintain their recognition as a university-sponsored alumni chapter or council. Each chapter or council should act in the best interest of the University of Louisville. Please see below:

1. Welcome and be inclusive of all UofL Alumni to participate in the chapter/council
2. Ensure that members of leadership for each group act as positive ambassadors of the University of Louisville (No negative commentary or opinions that are your own should be shared on the chapter/council's social media page or webpage)
3. Alert your Alumni Office Representative prior to contacting UofL faculty members, coaches and administrators about potential events
4. Alert your Alumni Office Representative promptly when your chapter or council's leadership contact information has changed
5. Include your Alumni Office Representative on any official business of your chapter or council (meeting agendas, minutes, etc.)
6. Manage alumni contact information with confidentiality and use tools and alumni list only for chapter/council business and promotion
7. Comply with financial policies as set by the Office of Alumni Relations and Annual Giving and the University of Louisville
8. Provide 4-6 weeks' notice on events that require email communication and/or registration page

9. Provide 2 weeks' notice on events or items that will require payment from chapter/council allotment
10. Receipts for reimbursement must be submitted with 30 days of date paid

Financial Support

The Alumni Relations and Annual Giving office maintains all chapter and council financial accounts. The Alumni Association does not permit any independent bank accounts. This requirement exists for several reasons, which include safeguarding against misused funds, continuity of account ownership through chapter/council leadership changes, and better accounting of donations and gifts. This policy is not to discourage fundraising efforts or control use of funds. Chapters and councils can still generate revenue in numerous ways and are solely responsible for making financial decisions.

Chapter or Council Dues

The University of Louisville Alumni Association is not a dues-paying membership organization. **Chapters or councils should not collect dues and fees.**

Chapter or Council Allotments

As a gesture for complying with our policies, the Alumni Association provides a yearly allotment to active chapter and councils. These funds may go toward any operating costs for the chapter or council and are coordinated through the Alumni Relations' unit business manager. The allotment is good for only the current fiscal year and renews July 1. The funds do not roll over. The allotment money is separate from any additional scholarship or operating funds. We will utilize the allotment before operating funds. Allotment funds cannot transfer to separate accounts such as scholarship funds.

Donations

Chapters and Councils can solicit donations to support the Alumni Association at events or through mail. If the donation is to go to a particular chapter or council, please work with your Alumni Office representative to ensure proper fund allocation. Your Alumni Office representative can help get any needed accounts set up; please contact the Office of Alumni Relations and Annual Giving with questions.

Processing Deposits and Disbursements Expenses

All original receipts and invoices should be provided to your Alumni Office representative for processing of payments to vendors and/or reimbursements. Revenues can only be collected in three forms: credit card, check, or cash.

Credit Card: The chapter or council must use the Alumni Association's registration system in order to collect credit card payments for an event or item purchased. Through this system, receipts are automatically sent via email, and the Alumni Association can easily process any payment. If the payment is a gift or donation to the university, gift credit can be established through this form of payment. Please work with your Alumni Office representative before communicating any information about tax-deductible gifts.

Check: Check payments can be received prior to or at an event. Receipts must be provided to each registrant and recorded properly. If a member of the Alumni

Association is not present at the time of the collection of the check, it should be sent via mail to the Alumni Association within two business days after the revenue was collected. If the payment is a gift or donation to the University, gift credit can be established through this form of payment. All checks should be made payable to the University of Louisville Foundation with event/fund information included in the memo section. Please work with your Alumni Office representative before communicating any information about tax-deductible gifts.

Cash: Cash payments cannot be received nor collected by volunteers. Cash may only be collected by an Alumni Relations and Annual Giving staff member. Gift credit can only be given for receipted transactions.

Communication Tips & Guidelines



UofL Alumni Association



UofLAlum



UofL Alumni Association



UofL Alumni

Our alumni chapters & councils play a crucial role in helping Louisville alumni stay connected in meaningful ways to one another and your alma mater. Your ability to communicate with alumni in your area is paramount to our collective success and the alumni office is here to serve you. In order to do that, we ask that you follow these guidelines while working with our office. Our primary goal is to develop and strengthen your network by providing brand standards, demographic data, marketing tools, and more.

Naming Convention

Chapters & Councils will follow the naming convention of “UofL (Anchor City / Unit / Constituent Group) Alumni Chapter”. For example, UofL Indianapolis Alumni Chapter. If your network has multiple surrounding anchor cities, or if your network has an alternate name, your office liaison and the communications team will help you determine the best solution.

Branding

The Louisville Alumni logo is a registered trademark and is registered with the Collegiate Licensing Company (CLC). Each of our official chapters & councils are extensions of this nationally recognized brand. Adherence to these standards strengthens the overall brand identity and recognizability by ensuring all chapters and councils are clearly tied to the overall brand and the university.

- **Logos** – A custom logo will be provided with the anchor city or unit name underneath the main Louisville Alumni logo. Due to the CLC licensing, these cannot be altered. Please use these logos

and the recognition of the brand to your advantage. Altering them in any way puts our licensing at risk, as well as hurts the brand image.

- **Printing** – Logos may be used on any in-house print project (flyers, etc.) once the main office has approved. For printing with a vendor (banners, t-shirts, etc.), this must be done through a university-approved vendor to protect the brand. The alumni office can help facilitate this process or connect you with an approved vendor in your area.
- **Mailings** – All mailings (letters, postcards, emails) will be facilitated through the communications team with your input.

Email

- **Email Account** - A group email *must* be utilized, not a personal account. This allows for continuity, easy recall, and shared access to the account even if chapter leadership changes. Leaders within the chapters & councils maintain these email accounts.
 - Naming Convention: Ex. group email = uofldallasalumni@gmail.com **not** personal email = meganlovescards@gmail.edu
- **Email Recipient Lists** - The Alumni Association regularly updates and maintains a database of alumni email addresses. Per University of Louisville policy, no email lists can be shared with external groups or individuals. This is to protect the privacy of our alumni network and their personal contact information. We have the most robust and up-to-date lists.
 - Please forward all biographical information to your office liaison to be loaded into our database. This allows us to manage unsubscribe regulations per federal requirements, as well as helps you grow your database. We legally must respect the recipient's opt-out preferences if they ask to no longer receive university messaging.
 - We have a dedicated biographical team who are regularly researching and updating alumni information to keep an accurate list of those who move into or out of your respective areas.
- **Sending emails** - UofL Alumni Association will gladly facilitate the sending of email communication and registration pages to alumni. Please provide the information to your office liaison who will then complete our internal communication request form. **For email messages, please provide final details to your office liaison no later than 4 weeks prior to the intended send date.** This will help the alumni communications team properly prepare and provide proofs of your email messages and event registrations.

Website

- Each chapter & council will receive a webpage built and hosted on the alumni website with the following URL: UofLalumni.org/CITY / UNIT
- While the communications team makes updates, chapter & council leadership must regularly monitor these webpages. These pages are here to use to the best advantage of your chapter or council. Please let us know when to update information, events will automatically be posted. The communications team is always happy to offer best practices and suggestions.

Social Media

Please work with our Asst. Director of Communication (ADC) for each social media platform your network hosts, she is here to help and serve as a resource to you. All social media accounts should use the custom chapter or council alumni logo as a profile picture and an image of your choice for the cover photo (People and friendly faces are best!! – ex: event photo, group pic, etc.).

Some things to note:

- Leadership is responsible for the creation of the page and/or group.
- The ADC should always be added as an admin or a group member. Your office liaison will be members of groups and/or following your accounts.
- Platform advice is always available from the communications team.
- Commit to a minimum and maximum amount of posts per week.
- Content suggestions include:
 - Area/Council/Chapter specific happenings
 - Follow fellow councils & chapters for ideas and best practices
 - Always create Facebook events for upcoming events, so we can help cross-promote.
 - Pull content directly from UofL Alumni Association social media accounts
 - Utilize www.UofLnews.com for all the latest university & community news.

Social Media Best Practices

On all Social Media Accounts:

- Follow and like the main alumni accounts on all social media platforms.
- Like, share, comment, or tag our posts. This strengthens the message and the brand.
- Include photo imagery, links, and tagged groups with each post when possible. This will increase audience size exponentially.
- Promote Alumni Association and constituent events regularly by tagging appropriate groups.
- **Use “#UofLAlumni”** and appropriate event hashtags, and include the **UofLalumni.org** website onto your posts when applicable. The use of #UofLAlumni creates consistency across our platforms and makes you and us more easily searchable for users. Our communications team regularly monitors use of this hashtag for the purpose of sharing and promoting your posts.

Facebook

- Create an official Facebook Group/Page
- Naming should follow the style of “UofL (ANCHOR CITY) Alumni Chapter” or “UofL (Unit) Alumni Council”, which should match your overall network name. (please refrain from using special characters.)
- Make your office liaison and the ADC administrators in the event additional assistance is needed, such as changing leadership.
- You are responsible for posting content and creating events
- Spotlight alumni accomplishments in your area
- Highlight sporting events as they relate to alumni initiatives
- Tag people on your chapter or council from your personal account

Twitter

- Use the shortest account handle possible to save character space (i.e. @UofL(CITY ABREVIATION)Alumni)
- Research appropriate hashtags, and utilize those selected for all events.
- Create conversations vs. one-sided posts
- Respond to mentions and tags regularly




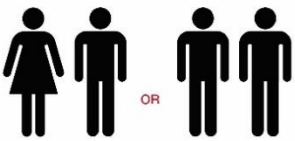
Instagram

- Naming should follow the style of “UofL (CITY) Alumni Chapter”
- Utilize strong image of alumni, constituent, or athletic events.
- Instagram is typically a more stylized social media platform, so get creative. Keep in mind the vast majority of Instagram users are under 40 years of age.

Text Messaging

Alumni and fans can text “UofLAlumni” to the number 51555 to receive exclusive deals and event information. In addition, custom text codes can be set up for your chapter or council. Users who opt-in can then receive custom messages directly from your group such as a link to donate to your scholarship fund or event promotions. Let your office liaison know your goals and they will work with the communications team to execute them.

When communicating, keep these proper terms in mind:

ALUMNA 	ALUMNUS 
ALUMNAE 	ALUMNI 

Sponsorship

Generating potential sponsorships for your chapter is encouraged in collaboration with the alumni office. Our role is help you maximize the value of your assets in relation to sponsorship best practices and to other chapters & councils. The alumni office is happy to help you put together a list of options to share with potential sponsors. Please email Lindsay Wehr at lawehr01@louisville.edu for assistance.

Gift Credit Procedures

If you intend to have either all or a portion of any event registration proceeds go towards your chapter/council gift account or endowment there is a specific set of rules and regulations that must be followed. This includes situations where part of the registration may be a gift or things like silent auctions may be included. We are here to guide you through this process and ensure that federal guidelines are followed so proper tax and gift credit can be administered. When submitting event details to your office liaison, please make them aware of your hope for gift credit and the alumni office will begin the necessary paperwork to ensure that you philanthropic goals are met.

Alumni Chapter and Council Structure

The most active alumni chapters and councils have a solid leadership structure. Though every group is different, there are some best practices for establishing and retaining good council leadership. The following information is best practice suggestions, for you to use as a model for both new and revitalized groups.

If you need help identifying leadership, please let us know. We can certainly help you identify potential leaders, and we can help. The best functioning councils consistently have 3-5 leadership positions with varying responsibilities. Leadership positions or committee areas could include:

1. Event Planning
2. Student Involvement
3. Fundraising
4. Communications and/or Social Media
5. Recruiting

It is to note the University's expectations of our chapter/council leaders. We request leaders communicate consistently with the Assistant Director of Constituent Relations or Assistant Director of Outreach and promote a positive image of the University of Louisville. You are one of our brand ambassadors in your respective area; you are a constant representation of the larger organization, the University of Louisville. As an institution, we operate under very particular policies and procedures, and we ask our groups to help us better serve you by following those policies and working with us when we must abide by their mandates. We appreciate your patience and understanding; together we will continue to make our councils and organization even better.

Working with other UofL Alumni Chapter and Councils

Your group can leverage time and energy by collaborating with other Alumni Chapters and Councils. Partnering with UofL Alumni Councils and Chapters can help expand you reach, conserve resources, and build a unified and more robust network.

Event Planning

The Alumni Association commits to assisting in your event planning. The best events are those where good preparation meets clear communication, and as there are chapter/council and campus events taking place daily, it is important to provide our office with ample lead-time on any type of event you wish to host.

Tips:

- When planning an event utilize the new event form to notify the Alumni office of an upcoming event. Submit this form **6+ weeks prior** to the event date.
 - Chapters click here; Councils click here
- Plan a meeting once a year to outline the following year's program of activities. Provide your annual plan to your Alumni representative.
 - Discuss dates, number of events, target audience, and communication plan
 - Delegate responsibilities amongst leadership and members

Examples of Alumni Chapter and Council events/initiatives:

- Golf Scramble
- Derby or other holiday parties
- Happy Hour at a new restaurant
- Block seating at a local event including local sports
- UofL Athletic game watch party
- Family friendly events: Day at the park, zoo, aquarium, cookout
- Student focused or young alumni events
- Academic Focused: Book Club, trivia nights, academic guest speakers, lunch and learn series
- Cultural Heritage Month events Community service events
- Networking Event

Advice:

- Be realistic: do not plan an event to plan one! Quality over Quantity
- Be resilient: It takes time to grow attendance and gain masses. Each event is a step towards gaining more members.

Evaluation/Assessment

It is important to spend time evaluating your Alumni Chapter or Council. Each year, the Alumni Chapter or Council should meet to discuss how things are going and identify if anything needs to change moving forward. Assess your volunteers, assets, events and connections. Some groups will even compile a survey to gauge their success and perception from peers. Your alumni representative can assist in creating and distributing a survey.

Click here to see an Evaluation/Assessment document with example questions

*Click here to see a sample survey *link to LA survey*

Chapter and Council Recognition Awards

To honor and recognize the achievements of the various Alumni Chapter and Councils, the Alumni Association will annually present the following awards. Criteria is below for each award.

Chapter/ Council of Excellence (Multiple Councils of Excellence may be awarded)

To become a Chapter/Council of Excellence, you must meet the following criteria:

- Host a minimum of 5 events per year. Only one game watch can count toward the five. These events should vary in nature and must include community service, networking opportunities, and academic enrichment. Others, such as family-friendly events, are also encouraged.
- Follow all communication and financial policies as outlined by this document

Chapters/Councils of Excellence will receive the following:

- Banner added to web page stating Council or Chapter of Excellence

Chapter/Council of the Year

To be eligible for Chapter/Council of the Year award:

- The chapter/council leader must nominate their respective chapter/council through a form that will be sent to all chapter/council leaders.
- Chapter/Council must meet all standards to be named a Chapter/Council of Excellence
- Chapter/Council leaders on the website must all be active annual donors to the Fund for UofL.
- The chapter/council must have been represented at the previous year's Alumni Leadership Workshop.
- Use the website provided by the Alumni Association, and follow all communication policies as outlined by this document.
- Follow all financial policies as outlined by this document.

The Chapter/Council of the Year will be recognized in the following ways:

- Recognition on the Alumni Association website and newsletter.
- \$250 in chapter/council account added to following year's allotment
- Banner added to webpage naming the winner as Chapter/Council of the Year and promotion of achievement communicated through our digital media.
- Chapter/Council of the Year plaque displayed at the University Club and Alumni Center.
- Picture on networking landing page
- Presenter at following year ALC

Chapter/Council Event of the Year

To be eligible for Event of the Year:

- Nominate an event through a form that is sent to all council leaders and provide a brief statement regarding why it should be considered Event of the Year. Photos and/or publications are encouraged.

The Event of the Year will be recognized in the following ways:

- Recognition on the Alumni Association website and newsletter.
- \$100 in chapter/council account to be added to following year's allotment
- Feature of the event on the chapter/council's webpage
- Presenter at following year ALC

Chapter/Council Volunteer of the Year

To be eligible for Volunteer of the Year, the volunteer must:

- Be nominated by a fellow chapter/council leader.
 - The nominator will write a brief statement regarding why the individual should be named Alumni Chapter/Council Volunteer of the Year. Supplemental documentation in the form of photos, letters of recommendation, etc. will be accepted.
- Be an active donor to the university.

The Volunteer of the Year will be recognized in the following ways:

- Receive a \$100 deposit into the chapter/council account to be added to the following year's allotment.
- Receive a plaque for their outstanding service and will be featured throughout the Alumni Association digital publications.
- Presenter at following year ALC
- Alumni spotlight in newsletter at some point in the following year