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McCombs Alumni Network

I. History

The McCombs Alumni Network was conceived and founded in 1996 as the Graduate Business Network by an enthusiastic group of students and alumni, committed to increasing the value of their degree by maintaining a connection between alumni and the school network. For twelve years, the McCombs MBA Alumni Network (renamed in 2002, after the school received its naming gift) provided indisputable value to MBA alumni and The University through active chapters in major U.S. cities, a growing presence in foreign countries, summer happy hours, winter networking receptions, annual reunions, and a multitude of other programs and services.

In 2007, as part of former Dean George Gau's strategic plan, the McCombs alumni community expanded to include BBA alumni in what was then called the McCombs BBA Alumni Network. McCombs alumni, faculty and staff celebrated the launch of the organization with receptions in Austin, Dallas, Houston, New York, San Antonio and San Francisco.

In 2008, faculty and staff representatives from the MBA, MPA, and BBA programs gathered with alumni leaders at the McCombs Alumni Relations Summit, deciding to unite the MBA and BBA alumni networks as one McCombs Alumni Network, serving all McCombs alumni. With the exception of cities of highest alumni population (Austin, Dallas, Houston, and New York), all alumni chapters would serve MBA, MPA, BBA, and PhD alumni, and the Alumni Office would organize programs and services for all.

The current McCombs Alumni Network refers to programs and services offered to all McCombs alumni. Examples include the Alumni Directory, *Texas* magazine, and 30+ McCombs alumni chapters.

II. Membership

All graduates of the McCombs School are automatically members simply by virtue of having graduated from the McCombs School of Business. There will be no dues required to be a member of the McCombs Alumni Network.

III. McCombs Alumni Chapters and Texas Exes Chapters

The mission of the McCombs Alumni Network is to increase the value of the McCombs degree by actively working with alumni, students, and the school to develop programs that foster personal and professional development and community and providing lifelong learning opportunities.

The Texas Exes mission differs slightly than the McCombs missions. It is to connect members to all University of Texas Alumni to each other and the past, present, and future of the The University of Texas. Whether it is through scholarships, teaching awards, career services, The ALCALDE magazine, or just plain fun, the Texas Exes exists to support The University of Texas.

The Alumni Relations & Annual Giving Office encourages McCombs Alumni Chapters to collaborate with their local Texas Exes chapter on events when it makes the most sense. For example: football game watching parties and Educational and Networking events when possible.

Chapter Overview

I. Introduction

Widely varying in size and activity level, McCombs Alumni Network chapters share common opportunities and face similar challenges. This guide for chapters has evolved out of the experience of chapter leaders and is available to all chapter members and alumni establishing a new chapter or sustaining and nurturing an established one.

II. Purpose of the Chapter

Although specific objectives may differ by chapter, the general purpose of McCombs Alumni Network chapters are:

- Maintain a local point of contact and strong affiliation for McCombs graduates.
- Provide networking and lifelong learning opportunities for McCombs alumni.
- Assist with the recruitment and encouragement of superior students for McCombs programs.

III. Scope of Activities for Alumni Leaders

Aside from planning events, chapter leaders interact with the McCombs School in two core ways.

• Alumni/Student Involvement

Many alumni play an integral role in advising and communicating with prospective and/or current students. Activities include advising or mentoring students regarding their career options, assisting students in obtaining summer or permanent employment in the local area, attending recruiting events, and assisting the MBA Admissions team with the interview process (MBA full-time program only).

Alumni Giving

The Alumni Relations & Annual Giving Office works closely with our volunteers in an effort to educate our alumni about the giving process, the opportunities available to support the McCombs School, and how donation dollars are used to accomplish initiatives. For questions concerning alumni giving, please email the McCombs Alumni Relations & Annual Giving Office at alumni@mccombs.utexas.edu.

Starting a Chapter

I. Introduction

Thank you for your interest in creating a new chapter. A formal chapter structure is recommended; however, the most important ingredient for a successful organization is not the structure, but the involvement of individuals who are truly interested in supporting and promoting chapter activities and building a strong alumni community. The following organizational model is one example of how a chapter can be configured.

II. Determining Alumni Interest

Prior to creating a new chapter, it is important to take the pulse of local alumni and gauge interest in supporting a limited program of chapter activity. For example:

- Invite two or three interested alumni to lunch or coffee to obtain their suggestions for chapter activities
 and discuss their interest in their own level of engagement. Encourage them to reach out to others in the
 area to ascertain interest.
- Utilize the Alumni Relations & Annual Giving Office resources.
 - 1. Request a list of alumni in the area or download one from McCombs Online Resources
 - 2. Coordinate a survey through the Alumni Office Qualtrics account.
 - 3. Solicit volunteers via the survey.
 - 4. Distribute a targeted email with a link to the survey
- Once several alumni have expressed interest, schedule and conduct the initial organizational steering committee to develop goals and objectives for the chapter.

III. Initial Organizational Structure

Although it is best to have a formal chapter board, organizing members should recognize that a start-up chapter usually results from the interest of only one or two people. Therefore, much of the organizing and continued stimulation of interest falls upon only a few. Often the greatest challenge is to find a number of enthusiastic volunteers who can share the programming duties with you.

IV. Chapter Action Plan

- 1. Contact Alumni Relations & Annual Giving Office for start-up suggestions and ongoing consultation: alumni@mccombs.utexas.edu.
- 2. Obtain list of local alumni from the <u>McCombs Online Resources Alumni Database</u>. Contact the <u>Alumni</u> Relations Office for assistance.
- 3. Get others involved and committed early in the formation. It is best to have a committee of people representing a broad range of graduation years, industries, and locations around the area.
- 4. Develop a survey and send it to local alumni. Questions can be posed to gauge needs, opportunities, identify potential volunteers, and overall interests in events and activities. The Alumni Relations & Annual Giving Office has an account with Qualtrics for chapter use. Contact the <u>Alumni Relations Office</u> to gain access to the account and learn how to view/leverage other chapter surveys.
- 5. Conduct an analysis of alumni in the local area by class, job function, and by job level to determine the type of programming that may prove most attractive.
- 6. Plan a limited number of initial events and strive for exceptionally high quality in these activities to encourage repeat attendance.

Examples:

- A. Organizational lunch for networking
- B. Breakfast meetings with local leaders of the community
- C. Happy hour
- D. Dinner before a local event (sports, theatre, concert)
- E. Faculty speaker event
- 7. Contact alumni via phone and email to ensure a representative turnout at the first few events. A well-organized telephone canvas of alumni can increase attendance. .
- 8. Set a goal to always have the "next" event planned so they can be communicated to those attending each meeting. Doing so will demonstrate a commitment to an ongoing program and indicate that thought and organization have gone into the formation of the chapter.
- 9. Build a chapter alliance with other alumni chapters from top business schools in your area. We encourage our chapters to take a leadership role in forming an alliance if one does not already exist. The expectation of an alliance includes planning 1-2 chapter alliance events each year. These types of events can provide networking opportunities, increase attendance, increase the pool of possible speaking talent, and expand the ability to have certain events sponsored by local companies.

Examples of alliances or other organizations:

- A. **Atlanta Business School Alliance** is an alliance of Atlanta-area MBA alumni clubs that work together to offer their members opportunities to network, learn about and discuss leading-edge business thinking and practices. www.atlantabsa.com
- B. **Denver Business Series** facilitates business and social interaction among a prominent group of business professionals living and working in the Denver area. The DBS Board organizes a speaker series featuring outstanding business leaders and pertinent business issues. www.dbseries.com

- C. **University of Texas Law Alumni Association** facilitates social interaction among law graduates for the purpose of strengthening ties to the University and to prominent leaders of the community.
- D. **Texas Exes** has many chapters throughout the world. More than likely they have a chapter in your city. Collaborating with Texas Exes can help increase attendance at events and broaden the alumni network in your city.

V. Long-term Continuity and Vitality

- Continually look for opportunities to add new alumni to broaden participation, stimulate ideas, and avoid early "burnout." One suggestion is to contact a new graduate every year and ask them to volunteer on the steering committee or for planned activities.
- Re-evaluate the objectives of chapter functions often in order to keep attuned to shifting desires of local alumni. Send a survey every other year to solicit opinions on overall programming ideas.
- The chapter must find a niche among the professional interests of local alumni. Survival of the chapter will depend on having the "customer" find value in attendance at chapter functions.
- Combine an update campaign with an event featuring an especially outstanding speaker who would attract alumni otherwise not inclined to attend chapter events.
- Send special emails or mailings to those alumni who were active in prior years. Determine if their needs have changed and if so, what type of programming might now interest them.
- Send general announcements or monthly emails describing the work done by the chapter (example: successful events, visits from high-profile speakers, recruitment news) and openly solicit volunteers to join the chapter and become involved.
- Host a low-cost reception where the entry fee is waived for those alumni who bring along an alumnus or alumna who has not already attended a chapter event.
- Conduct an inventory of your steering committee and local alumni to see what resources (meeting space, sponsorships, and speaker contacts) are already available to the chapter through their networks.

Chapter Organization

I. Suggested Chapter Committee Organization

Chapter President or Co-Presidents

- Recruits a chapter leadership team of three to five members.
- Oversees responsibilities of all committee chairs and chapter volunteers.
- Guides the chapter's calendar of activities.
- Conducts the chapter meetings.
- Develops an annual plan for the chapter.
- Serves as the primary liaison with the Alumni Relations & Annual Giving Office and attends monthly chapter president conference calls.

Events Committee Chair

- Plans and coordinates chapter activities and events.
- Ensures that programming reflects local alumni interests and needs.
- (example: both recent graduate and older graduates).

Membership Committee Chair

- Helps educate alumni about updating information in the alumni directory.
- Assists the Alumni Relations Office with maintaining quarterly newsletters, monthly emails, and chapter Web sites.

Marketing and Communications Chair

- Develop and maintain the chapter Web site. The Alumni Relations Office can provide access to the Convio server.
- Work with the Alumni Relations Office to create a chapter committee list serve.

External Relations and Fundraising Chair

- Organizes and coordinates efforts with other business school alumni organizations and/or professional associations.
- Serves as liaison between local McCombs alumni and Texas Exes chapter(s) to coordinate calendars and potential collaborative events.
- Assists with finding local sponsors for events in exchange for publicity and participation of employees.

II. Alumni Relations & Annual Giving Office Support

The Alumni Relations & Annual Giving Office takes on several functions and responsibilities designed to make the efforts of your chapter more successful and rewarding.

Examples:

- Provide lists of alumni in each area upon request. The accuracy of this information depends on the
 active communication of alumni with the McCombs School. Encourage your chapter members to
 update their information at https://acsprod.mccombs.utexas.edu/MOR/
- Maintain the Alumni Network Web site, which provides access to alumni information for all McCombs alumni. Our website includes access to the alumni database, calendar of chapter and network events, career resources, directory for chapter president contact information, , publications and networking opportunities. The Web site also links to the McCombs Alumni Network's various social networking tools, including Facebook, LinkedIn, Twitter, and the McCombs Alumni Network blog.
- General program planning and chapter event advice.
- Event coordination tools, including registration sites (RSVP and/or collection of fees), processing of contracts and payments to vendors, nametags and event materials as available.
- Maintain files of past activities and other resources to help measure the success of the chapter.
- Coordinate with event chair to plan events around important school calendar dates (e.g. Welcome Reception, student trips, etc.).
- Update individual address changes .
- Publicize alumni news.

Successful Program Planning

I. Introduction

The type and number of events will depend on the size of the chapter and the interest level of the alumni. We encourage chapters to have at least two events per year-for example: Summer and Winter Receptions. Below we have listed some guidelines to help with your programming. Strong events, based on quality and variety, are the cornerstone of a successful chapter.

II. Selecting an Event – Two-Three months prior

Consider:

- Objective: Is it networking, recruiting, young alumni, family participation, education, serving the community, or a combination of these?
- Target participation group: analyze past events or other chapter activities, look who has attended them, and plan accordingly.
- Events the chapter has hosted in the past: What made them successful? Why?
- Optional: hold a joint event with your local Texas Exes Chapter

III. Selecting a Date – Two-Three months prior

Consider:

- Conflicts with other holidays or events in your area.
- Availability of location.
- Lead time necessary to promote your event (coordinate communications with Alumni Relations Office six weeks prior to the event date).
- Time of event: Consider a breakfast or lunch event.

IV. Identifying a Location – Two-Three months prior

Consider:

- A unique location that will draw people to your event.
- Determine the optimal geographic area by asking the alumni in the community which area of the city works best for them (either through word-of-mouth or by a formal survey).
- Size of room needed for type of event.
- If the location is easy to find (provide a map when possible).
- If parking is easily accessible.

V. Financial/Budget - Two months prior

Consider:

- Estimated number of attendees.
- Cost per person for food and refreshments.
- All associated costs: room rental fees, in-house catering, equipment charges, parking fees.
- Sponsorship opportunities See Appendix F.1
- Submit the estimated budget to the Alumni & Annual Giving Office.
- Submit all contracts to the Alumni Relations & Annual Giving office for processing. Alumni cannot sign contracts on behalf of the University.

VI. Marketing - At least one month prior

Consider:

- Determine dates for emails to be sent to alumni. Three emails starting at least one month prior are recommended.
- Content for email (use language to create interest).
- Use Email Request Form to ensure you have included all the necessary information See Appendix H.
- Calling Campaign Have chapter committee members call local alumni to encourage them to attend the event.

Sample Chapter Events

I. Social:

- Monthly happy hour at various places around the city.
- Gather for athletic events (local professional teams, or the University of Texas at Austin teams).
- Restaurant visit or "supper club."
- "Welcome to the Chapter" receptions to welcome the new graduates into the area and also any other alumni new to the chapter.
- Networking events with alumni from other business school programs.
- Winter and Summer Receptions. In the past the Alumni Relations & Annual Giving Office provided funds for these receptions. Going forward chapters will be responsible to either charge attendees to cover all cost or find sponsors for these receptions. Please refer to Financial Information on page 12.

II. Educational:

- Faculty Speaker Series Co-sponsored with the Alumni Relations & Annual Giving Office (one event per academic year per chapter).
- Business leader panel comprised of local business leaders and/or alumni.
- Alliance with alumni from local business school to host a joint event featuring a guest speaker from their business school.
- CEO Breakfast
- Local company visit
- Career development seminar.

III. Philanthropic:

- Volunteer as a group.
- Collection or drive by asking alumni to bring a canned good or a toy for a local charity.

IV. Student/Alumni Networking

- Welcome receptions for incoming students hosted by local alumni and current students.
- Topical networking events when current students visit the area (example: company field trip).
- Assistance with fall recruiting events: local admission volunteers, optional interviews, and recruiting forums.

V. Joint Event with Texas Exes

- 1. Football game watching parties
- 2. Networking and educations events

Annual Planning

I. Introduction

Program planning for an entire year is the most efficient, manageable way to host successful events. Responsibilities can be delegated early, and the Alumni Relations & Annual Giving Office can give full support to marketing and promoting an event. Annual planning also strengthens the chapter's sense of purpose and allows time to carefully plan and execute each event.

II. Guidelines for Annual Planning

- Map out the number of events you think the chapter can support by means of volunteers and possible
 monies. Remember that it is not quantity, but the quality of the event that will make your chapter
 successful. You should strive to consistently plan events that are of value to the local alumni base, not
 simply planning events for the sake of having an event.
- Check dates for possible conflicts with other events.
- Focus on the various connections that the chapter wants to make with the local alumni.
- Plan programs that appeal to a variety of alumni.
- Schedule annual or seasonal events and publicize them at every alumni event. Members will be able to anticipate when certain activities will take place each year.
- Estimate costs for each event and determine potential number of attendees to set fees for each of the events or to know the amount of sponsorship needed to host event.
- Determine how responsibilities for each event will be disseminated early so volunteers can plan according to their own schedule.
- Reconcile at the end of the year what events were planned in the beginning and what events actually took place. Examine results to help with the next annual plan.

III. Strategy Meeting

For your planning meeting, these questions should be answered:

- How many events do we want?
- What type of events do we want to have?
- At what time during the year do you want to have events?
- Who will be invited? (all alumni, recent graduates, older graduates, Texas Exes Chapter members)
- Who will be in charge of each event?
- How much will these events cost?
- Will we charge for the event?

Financial Information

I. Introduction

The Alumni Relations & Annual Giving Office will support major chapter events by providing an online registration site, marketing, collection of fees, processing of contracts, payments to vendors using fees collected and event materials (nametags, etc). For the Faculty Speaker Series, funding for faculty travel expenses will be provided. The chapter is responsible for costs related to venues and refreshments served and any other related costs.

II. Chapter Event Funding

We encourage that events be planned on at least a cost recovery basis. Here are some ways to cover costs for events:

- Charge alumni for the event by dividing the total cost of the event by the number of potential attendees. Note: pre-payment is an excellent way to guarantee attendance.
- Solicit event-related donations, like the use of a room or a service free of charge.
- Procure event sponsorships, from individuals or companies/corporations. See Appendix F.1, for Sponsorship Fact Sheets and proposal examples

III. Cost Considerations

- Facilities (room charge, deposit, parking, catering fee, etc.)
- Food and beverages, plus tax and gratuity
- Decorations
- Entertainment
- Speaker gift, if applicable

IV. Reimbursement Policies

- All requests for reimbursements must be pre-approved by Alumni Relations & Annual Giving Office.
- Original itemized receipt with original invoice or statement indicating amount paid in full. Tips cannot exceed 15% unless otherwise indicated on final bill (18% gratuity if printed on bill).
- Complete Payee Information Form (The Alumni Relations & Annual Giving Office will provide this form).
- Please expect a 3-4 week turnaround for reimbursement.
- Any questions concerning reimbursement should be directed to the Alumni Relations Office alumni@mccombs.utexas.edu.

Chapter Promotion and Publicity

I. Introduction

There are various ways to promote the activities of your chapter and help incite alumni interest in building a strong community. Getting the word out about chapter events early and often is extremely important. The Alumni Relations & Annual Giving Office can assist with the communication plan for the chapter.

II. Modes of Communications

Web site:

The Alumni Relations & Annual Giving Web site includes a current calendar of events for all chapters.

Email Distribution Lists:

The Alumni Relations & Annual Giving Office maintains email communication for all chapters. Email can be utilized to announce upcoming events and chapter information. All chapter communications must go through the Alumni Relations & Annual Giving Office. Please note that the Alumni Relations & Annual Giving Office emails chapter news and updates on Thursdays, and the deadline for inclusion each week is noon on Tuesday.

Newsletters/Monthly Email Updates:

The Alumni Relations & Annual Giving Office sends out a monthly electronic newsletter to all McCombs alumni in the form of top headlines from the McCombs Alumni Network News blog. Specific chapter events can be included in the communication.

• Social Networking:

The Alumni Relations & Annual Giving Office maintains official Facebook and LinkedIn groups for all McCombs Alumni, as well as a Twitter account. Chapters may create additional Facebook groups for their chapters, or request that content be added to official Facebook pages or messages. See Appendix G.

III. Message for Communications

- Use the Email Request Form and include the following information (see Appendix H)
 - o Name of event.
 - Brief description of event.
 - o Time of event (if a reception precedes program, include time of each).
 - Location of event.
 - o RSVP deadline-usually 1-2 weeks before event.
 - Cost per person (if a family event, is cost less for children).
 - o Information on provisions (appetizers, cash bar, dinner).
 - Information on parking (free, valet, location).
 - o Information on attire, if necessary.
 - Name and phone number of person to call for more information.
 - o If the event is sponsored, the Alumni Relations & Annual Giving office will include the name and logo of the sponsor on all communications.

If McCombs School or The University of Texas at Austin logos are included, then please visit the following web site to verify legal usage:

http://www.mccombs.utexas.edu/brand/gif_logo_download.asp#Nomenclature

IV. Follow-up Action

- Complete a event evaluation form (see Appendix A) and return to the Alumni Relations & Annual Giving Office. See Appendices A.
- Send a thank you note to any speakers or people who contributed in a special way to the event (example: corporate sponsors, specific volunteers).
- Forward any pictures taken during the event to the Alumni Relations & Annual Giving Office. We will post them on the Web site and in other marketing materials.

Appendices

Appendix A: Event Evaluation Report

Appendix B: Event Sign-In Sheet

Appendix C: Event Checklist

Appendix D: Sample Annual Plan

Appendix E: Best Practices from other Business Schools

Appendix F: Sponsorship Materials

1. Checklist for Corporate Sponsorship/Underwriting

2. Sponsorship Proposal Template

3. McCombs Alumni Network Fact Sheet

Appendix G: Facebook Information

Appendix H: Email Request Form

Appendix A: Event Evaluation Report

Chapter/Network Name					
Event Information					
Date:					
Title:					
Location:					
Type (mark all that apply)					
Social (reception, happy hour, picnic, tailgate	e, etc.)				
Educational (speaker, workshop, etc.)					
Philanthropic (volunteer project, charity fur	ndraiser, etc.)				
Number of Participants: (mark all that apply)					
Alumni					
Current Students					
Prospective Students					
Guests					
Total Budget (projected)					
Alumni Office Budget Allotment					
Sponsorship?					
Name(s)/Amount(s)					
Amount charged to					
Total Expenses					
Net Profit/Loss					
Event Evaluation					
Networking Environment:	excellent	good	okay	poor	
Program Agenda (speaker, panel, etc.):	excellent				
Facilities:	excellent	_ good	okay	poor	
Food/Beverage:	excellent				
Equipment:	excellent				
Overall Event:	excellent	_ good	okay	poor	
Recommendations for future events:					
Submitted by	Date				

Appendix B McCombs Alumni Network Event Attendance Form

<u>City:</u>	<u>Date:</u>
	<u>City:</u>

Name (please print)	Program & Grad Year (ex. BBA 00)	Email Address	Interested in Getting Involved

Appendix C Event Planning Checklist

Budget:
Determine cost for venue
Estimate number of attendees
Catering costs per person (food, drinks, parking)
Include events materials, if applicable
Establish cost per person
Location:
Location is central in area (easy access for majority of attendees)
Parking is adequate; public transportation is available, if needed
Facilities:
Name of representative responsible for your event
Lighting Controls
Heat/Air Conditioning
Arrange for music, if needed
Room accessible to the handicapped
Size of room is adequate
Registration/Welcome table
Set-up time
Partitioned rooms, check on other activities in adjoining rooms
Equipment is available, if needed
Equipment is available) if needed
Materials:
Sign-in sheet
Name tags and pens
Business school handouts, brochures and information cards
Banner
Table tent card
rable tent cara
Bar Arrangements:
Cash bar is setup unless full bar is sponsored
Confirm that other drinks will be available
Decide time bar will open and close
Food Arrangements:
Determine program and timing of food presentation
Hors d'oeuvres chosen and price determined are served, how elaborate
If time is short (particularly at lunch), ask that first course be preset
If meal, decide per plate price (including all taxes and gratuity). If the banquet menu price seems too
high, ask them to plan menu based on your suggested per plate price.
Confirm deadline for submitting the guaranteed number of attendees.
Confirm the number of meals above the guarantee that caterer will prepare.
Discuss billing arrangements
Discuss Simily diffully circles
Hospitality:
Determine where to meet speaker(s) prior to event
Decide if a small gift for the speaker or special guest is appropriate
—— a O a a a a a b a a a a b a a a b a a a b a a a b a a a b a a a a b a a a a b a a a a b a a a a a b a a a a

____ Select alumnus or alumna (chapter leader) to act as hosts for the event Appendix D

Best Practices

Below is a list of "best practices" that your chapter might find useful when building and maintaining the chapter.

Programming

- 1. Poll your members to find out what kind of programs appeal to them.
- 2. Approach programming as a marketing challenge "Who is your customer?" "What product is attractive?" "What added value does the chapter provide?"
- 3. Consistency is very important-holding annual events can be a draw for members.
- 4. Provide ample lead time and advance notice for events.
- 5. Programming is integral to maintaining/sustaining participation- as programming drops off, so does participation.
- 6. Events need to be unique-something people would not normally do on their own.
- 7. Programming should have educational value, providing exposure to stimulating, practical new ideas.

Leadership

- 1. Meeting once a month can serve as a means of redistributing work and as a forum for finding resources within the group.
- 2. The important point is not so much that there exists a magical structure to club leadership so much as it must include people who know what they should be doing and a leader who delegates the tasks at hand.
- 3. Establish a mission statement for the chapter so that everything is approached in a meaningful way.

Communication

- 1. Newsletters should include a calendar of events, a recap of programs and information about becoming active in the chapter.
- 2. Use a newsletter or web page to recognize everyone in the chapter who has been helpful.
- 3. Have a set format for all communication-it trains people where to look for information.
- 4. Continuous communications with existing active alumni base is necessary.

Increasing Alumni Participation

- 1. To entice people to become active, announce the entire year's programming at a specific time of the year depending on annual plan.
- 2. Kick-off the year by hosting a happy hour for all local alumni- this will help draw new graduates or alumni who just moved to the area.
- 3. Review the demographics of your alumni pool: major professions, industries, or companies.
- 4. "Perceived" value is critical. Alumni want to feel like they are part of a successful and valuable community with strong networking capabilities.
- 5. One of the most important factors in increasing interest is the support of the McCombs School and the advisory boards of the McCombs Alumni Network.

Cost Issues

- 1. There is no clear correlation between cost and attendance. If the chapter has an interesting event, alumni may be willing to pay a higher price.
- 2. Securing local sponsorships not only assists with a chapter's expenditures, but also builds a relationship for possible employment and recruitment opportunities.

Appendix E Sample Annual Plan

Below is a sample of a chapter annual plan.

Goals for the Chapter

- 1. Create an identity: Understand how this organization is distinct from other University organizations. We need to develop a way for alumni to connect to the McCombs School of Business.
- 2. Establish structure: Create a sustainable process for planning and executing events.
- 3. Organize quality events: Make our activities compelling and worthwhile for Austin alumni.

Committee Information

Committees will be responsible for planning and managing their events. The level of planning required varies depending on the nature of the event. As described below, events on the calendar have been classified as high, medium, or low planning intensity to give committees some indication of what is expected.

Committees formed: Social Volunteer/Community Education

Planning Intensity	Description	Typical Activities
LOW	Not organized by Alumni Relations Office- cosponsored, etc. One person is the alumni relations contact person. Primary role is publicizing event.	Email two weeks to one month in advance. Reminder 1 week in advance.
MEDIUM	Organized by Alumni Relations Office One person takes the lead. Roles include planning, publicizing, and managing.	Lock on date/venue at least two months out. Email 1-2 months in advance, one or two reminders. Manage logistics, venue, volunteers.
HIGH	Organized by Alumni Relations Office, medium to large attendance. Required extensive planning, committee splits duties.	Lock on date/venue 2-6 months Monthly committee meetings. Invitations sent 2-3 months out. Manage logistics, venue, volumes.

The Austin chapter will send out a monthly email to the local alumni distribution list to highlight upcoming activities. All other communications for the Austin chapter should be coordinated with the steering committee and the Alumni Relations & Annual Giving staff.

Calendar Committee legend: Social - pink Volunteer- green Education- yellow

Date	Event	Target Attendance/Audience	Planning Intensity
May 02	Pan-MBA Spring Fling 5-16-02- organized by Michigan alumni president and Austin chapter leader	Large: other MBA programs	Low
June0 2	Thunderbird/McCombs Career Panel: joint panel to discuss career change	Small: focus on recent graduates	Medium
July 02	Volunteer Activity: TBD Possible focus on children or environment		TBD
Aug 02	Student Welcome Reception 8-2-02 Alumni Relations funding	Large: all Austin alumni, incoming students, current students	High
Sept 02	Fall Party 1-Fundraising event for '03 holiday reception	Medium: all classes	High
Oct 02	Pan- MBA Speaker: Breakfast speaker, to be organized with another MBA alumni group	Medium: all classes	Low
Nov 02	Fall Party 2-fundraising event for '03 holiday reception	Medium: all classes	High
Dec 02	Holiday Toy Drive: happy hour, possibly include other MBA alumni groups	Large: all Austin area alumni	Medium
Jan 03	Holiday Reception: attempt a bigger event- gala, alumni awards	Large: all Austin area alumni	High
Feb 03	Austin Motorola Marathon water station	Small: volunteers from all classes	Medium
Mar 03	Women in Business Leadership Conference: help recruit panelists, recruit attendees	Large: all classes	High

Appendix F.1 CORPORATE UNDERWRITING/SPONSORSHIPS

One of the best ways to obtain financial assistance for your chapter's events is to involve local businesses in the promotion of your event. The following information is provided to assist you in making sure that your request for underwriting assistance gets the attention it deserves.

- Consider all possibilities for advertising exposure for business sponsors at your events (signs, banners, programs, centerpieces, podium banner, logo cups, place mats, etc.).
- Find out when potential sponsors set up their budgets. Many businesses cannot donate once their budget is approved for the year.
- Create a "target sponsorship list" surrounding their potential to advertise to our target audience, what
 makes sense from the perspective of the business school, and which companies could benefit as sponsors.
 *UT has a strict policy against name recognition and logo placement for alcohol, tobacco and fire arm
 companies. They cannot be recognized in any communication or signage at an event. Advertising ideas
 should help the event financially and help the advertiser or sponsor by providing good value for
 advertising and promotional dollars.
- Assign a sponsorship chair or a committee to work closely with the event chair and chapter leader.
- Develop an explanation of sponsorship benefits detailing exactly what sort of exposure the company will be getting for their money. Include value for exposure such as number of people at event, number of times name will be seen, announced, etc.
- Develop a letter/proposal to target companies. Include the following key points:
 - o Attention-getting opening
 - o Reason for letter
 - o Explain what the event is and what and who it involves
 - Detail sponsor's obligation
 - Detail chapter's responsibilities
 - Summary of proposal
 - o Information to provide credibility such as fact sheets about McCombs School and McCombs Alumni Network, past chapter sponsorships and successes
 - Invitation to become involved at some level
 - Commitment to follow-up and to contact personally
- The best way to solicit a sponsorship is through a personal appointment with a decision-maker from the company. State your proposal clearly and concisely-like you, these people don't have a lot of time.
- Remember...
 - Start early
 - Contact many potential sponsors
 - o Know what you can do for a sponsor
 - Deliver what you promise
 - Send thank you letter to company

Appendix F.2 Sponsorship Proposal Template

Note: Please follow the template below in preparing your sponsorship proposal, recognizing that some items may not be relevant for your event. This version of the template has explanatory comments in italics.

Name of Event:

Date of Event:

Venue for Event:

New or Annual Event? *If annual, describe past event successes*:

Expected Number of Attendees:

Attendees: Brief description (ex. McCombs alumni, other business school alumni, current McCombs

MBAs/BBAs/MPAs,, and invited outside guests)

Event: A compelling and brief description (5-6 lines) discussing purpose, activities, and goals.

Alumni Chapter information: *Brief description about the chapter's history.*

McCombs Alumni Network: Brief description of alumni network. Use "About the McCombs Alumni Network" fact

sheet according to event.

Sponsorship Opportunities:

You will need to develop sponsorship benefits for your event. If there is only one main event (activity), you'll need to decide if there are recruitment/networking opportunities, whether the sponsor will be introduced at the event, and whether the sponsor has an opportunity to speak to a large group, where the company name and logo will appear on various communication tools. These are common questions and your response should be planned in advance. As you market your proposal and learn more from sponsors, you may want to change the benefits. When recognizing a sponsor, the University of Texas at Austin requires that we do NOT use the term "sponsor." Instead use something like "hosted by" or "special thanks to" to recognize the company.

Program and/or Speakers (with titles): Brief description.

Bio of Speakers: Brief description.

Budget: The total budget/event amount.

Primary Chapter Contact:

Deadline for being included in publicity:

Sponsors will need to send you their logo graphic in a format that can be printed (.eps, .ai, or .tif.) Low resolution formats copied from Web sites will not work.

Appendix F.3 FACT SHEET: McCombs Alumni Network

Mission: Fostering the Legacy of the McCombs Degree

The mission of the McCombs Alumni Network is to increase the value of the McCombs degree by actively working with alumni, students, and the school to develop programs that foster personal and professional development and community and providing lifelong learning opportunities.

McCombs Alumni Network Programs/Services:

The McCombs Alumni Network provides valuable programs and services to keep alumni connected to McCombs and each other. Visit http://new.mccombs.utexas.edu/alumni for more information.

- Community-wide networking database
- 30+ chapters around the world
- McCombs Monthly e-newsletters
- Strategy conferences to aid new school programs
- Annual reunions
- Annual Business Conference
- Mentorship Program
- Faculty Speaker Series
- And much more

If you would like to get involved in the leadership of a current program or service or the creation of a new program or service, please contact the Alumni Relations Office.

McCombs Alumni Relations Contact Information:

Fmail:

alumni@mccombs.utexas.edu

Local Phone: 512-232-2441

Address:

University of Texas McCombs School of Business 1 University Station, B6006 GSB 3.126 Austin, Texas 78712-0205

Appendix G

Facebook for Chapters

Facebook continues to grow in popularity among users of all age groups due to its versatility, ease of use, and ability to share information and pictures with segmented audiences. Allocating a minimal amount of time to create and maintain Facebook groups or pages will enable your chapter to build community among members, reach out to unconnected alumni in the area, and to promote or provide a recap of events. There are very few rules associate with Facebook, so we encourage you to have fun customizing your group or page to fit your desires.

To get started, decide if you want to use a group or page. The key differences are outlined below:

- 1. Admin status: If you create a group, you will be identified in your postings and communications by your real name, just as if you were posting a comment on a friend's wall. If you create a page, your personal identity will be subsumed by the identity of the chapter. On that page, you will become, say, "McCombs Alumni Network Austin Chapter" and your picture will be replaced by whatever photo you've uploaded to represent the chapter.
- 2. **Communication:** Groups and pages both allow you to send notes to all members. If you message a group (up to 5,000 members), it will appear in each person's Facebook inbox. Page administrators can contact fans in two ways: by posting a status update, which will appear on fans' front pages just like any other friend's update, or by sending a "Page Update," which will appear as a link in the top-right corner of each fan's front page.
- 3. **Applications:** Pages allow you to use a variety of tools and applications that are unavailable to groups. A word of warning, though: Many of these applications work better in theory than in practice.
- 4. **Membership Restrictions:** In general, anyone can become a fan of a page; membership of groups can be more tightly restricted.

So which is best for an alumni chapter?

- 1. Groups and Pages both feature the same essential tools: discussion areas, events, and places to post links, notes, photos, and videos. Groups also allow any group member to start a discussion board which cannot be done on a page.
- 2. We recommend that you choose the option that best mirrors the size and personality of your chapter. It also depends on how the chapter wants to use Facebook. If the chapter wants to use Facebook to push information out, then a page is probably the best choice. If, however, the chapter wants to use Facebook as a two way communication between members and the chapter then a group is probably the better option.

3. In general, large chapters should probably use pages, smaller chapters should probably create groups. If you have additional questions, please contact Kelly McNamara, at kelly.mcnamara@mccombs.utexas.edu.

Please notify the <u>Alumni Office</u> once you have created a group or page so that they can refer alumni to it and also promote it on the Web site.

For consistency and identification reasons, please use X for the profile image for the group or page you create.

Getting Started

Facebook offers useful and succinct how-to information, and given the frequency with which they update their tools, it's best to simply follow their advice.

Groups: http://www.facebook.com/help.php?page=826

• Pages: http://www.facebook.com/help.php?page=175

Best Practices

Online communities don't just happen. If you decide to create a page or group for your chapter, don't assume it will spontaneously and organically grow into a useful resource. Check it frequently, respond promptly to comments and questions, and welcome new members.

Avoid message overload. Facebook users will voluntarily join your group or page, and presumably they will do so because they want to hear from you. But don't overwhelm them with messages (in the case of groups) or page updates.

Practice wise discretion when moderating comments. We've all seen online discussions get out of hand. Although it's unlikely to happen, as the administrator, you might be called upon to remove or edit a member's comments. Please keep in mind that your group or page does reflect on – even if unofficially – UT and McCombs.

Appendix H EMAIL REQUEST FORM

Requested Email Date(s)*
Date #1:
Date #2:
Date #3:
*Should be a Thursday unless special permission is obtained. Deadline for requests is noon on Monday.
Event title:
Who is invited? (City or state; BBA, MPA, MBA, MSTC or Ph.D. alumni; new MBA admits; MBA students; etc.)
Date of event: <day of="" the="" week="">, <month>, <calendar date=""></calendar></month></day>
Start Time: End Time:
Location name:
Location address:
Cost:
Brief Description/Event Details:
Include special images or logos? If yes, please attach a jpeg file. Please do not paste the image in this form. This will degrade the quality of the image.
Special Instructions:

Is an event registration page required? Yes No (If yes, complete information below.)
Attendance Option: RSVP or Paid Ticket
Accounting Code (if paid event, for staff use only):
Registration Deadline:
(Deadline will be midnight of the date selected. If this is the event date, registration will close at the time
the event begins.)
Registration Limit (optional):
Event Description (if different from email description above):
Please note that all event registrations will ask for: first name, last name, email address, UT EID, most
recent McCombs degree, most recent McCombs grad year, professional title, company and address.
Optional registration questions (check all that apply):
First name (as you would like it to appear on your nametag)
Include graduation year on nametag?
Guest's first name (if applicable)
Guest's last name (if applicable)
Guest's McCombs degree (if applicable)
Guest's McCombs graduation year (if applicable)
Do you have any special dietary needs?
Would you like to get involved with your local McCombs Alumni Network chapter?
Other questions (please specify)
Confirmation Message (This is the page that will appear after attendees submit their registration.)
Default text
Special text (please include)
Confirmation Email (automatically sent immediately after registration)
Default text
Special text (please include)
Reminder Email (sent 1-7 days before the event, per the registrant's preference)
Default text
Special text (please include)