UCI Alumni

CHAPTER HANDBOOK
2023-2024

ANTEATERS INFINITUM

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THE UCI ALUMNI ASSOCIATION

Our Mission

To enrich the lives of alumni and engage them in the lifelong advancement of UCI.

About UCIAA

The UCI Alumni Association (UCIAA) is a nonprofit organization dedicated to connecting our alumni with each other and the university by presenting opportunities to network, be involved, support our students and serve as advocates for UCI and the University of California. The UCI Alumni Association was established in 1968 and later separately incorporated in 1975 as a California nonprofit. The Association is governed by a board of directors comprised of 21 elected directors, five voting members (including five-chapter representatives) and five non-voting members.

Newkirk Alumni Center

The Newkirk Alumni Center is the home of the Association. Located near the corner of University Drive and Mesa Road, it serves as a gateway to the campus. The Newkirk Alumni Center features 12,500 square feet of flexible event space to host a variety of events. The Center is a hub of activities for alumni, parents, students and the campus community.

UCIAA Chapters Team

UCIAA has four staff members dedicated to supporting chapters, listed below.

Additional UCIAA staff can be found here: engage.alumni.uci.edu/s/uciaa-staff

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UCIAA Board

Alumni Office

Academic Chapters	Multicultural Chapters	Industry Chapters	International Chapters	Regional Chapters
Campuswide Honors Alumni (CHA)	Armenian American	Anteaters in the Arts	Beijing, China	Chicago
Engineering Alumni Society (EAS)	Black Alumni	Anteaters in Education	Seoul, Korea	Los Angeles
Dance	Chinese	Anteaters in Law	Shanghai, China	New York
Graduate Alumni	Filipino American	Anteaters in Pharmacy	Shenzhen, China	Orange County
Information & Computer Science (ICS)	Iranian American	Law Enforcement Officers (LEO)	Singapore	San Francisco Bay Area
Nursing	Indian	Urban Planning	Tokyo, Japan	Seattle
Public Health	Korean American			Washington, D.C.
Medicine	Latino			
	Vietnamese American			

UCIAA MEMBERSHIP

Chapter leaders are encouraged to be active, paid members of the UCI Alumni Association. You can feel good knowing that membership dues support all that we do, from expanding our chapters and programming to recognizing the outstanding achievements of alumni, students, faculty and staff through UCIAA's long standing Lauds & Laurels awards ceremony. And, every year we reunite Anteaters by bringing them back to campus for our annual Homecoming celebration. So - save some money, have some fun, and stay connected all while supporting the Association that represents you and other Anteaters around the globe!

Top Benefits of Membership:

1. **Stay connected:** Find out the latest UCI news, research, and updates.

2. **Help yourself:** Every membership helps increase UCI's national ranking.

3. **Save money:** Get discounts on a wide variety of goods and services.

4. **Have fun:** Receive exclusive access to exciting events and programs.

5. **Show your pride:** It's just the right thing to do.

For more detailed information on membership, please visit: alumni.uci.edu/join

(For current Membership Rates, see page 6)

MEMBERSHIP TIERS

There are four tiers of membership in the Association: General, Annual, Life, and Golden Life. All UCI alumni are members and able to participate in all chapter activities.

General Membership

A General Member of the Association shall be anyone who meets one of the following requirements:

- Any person who has been awarded a degree from UCI.

- Any person who been awarded a blue seal, gold seal, or specialized studies certificate from the Division of Continuing Education.

UCI Alumni

General Members receive entry-level benefits as described in the *Membership Tiers and Benefits Table (See page 7)*, some exceptions apply.

Annual Membership

An Annual Member of the Association shall be anyone who has paid the annual dues (students, alumni, faculty/staff, friends, and DCE alumni).

Life Membership

Anyone can become a Life Member in the Association upon payment of sum set by the UCIAA Board of Directors, subject to change as it sees fit. Such sums, designated Life Membership dues, may be made paid in full or in installments established at the time of initial payment. The dues for Life Memberships shall be placed, in whole or in part, in the Association's Life Membership reserve fund at the UCIAA Board of Director's discretion.

Installment Plan

Anyone is eligible to enroll in a Life Membership installment plan, internally referred to as *Paying Life Membership*, in the Association. While dues are being paid, installment plan purchasers are recognized as Annual Members and can redeem Annual Member benefits. When all payments are complete, the purchaser is then deemed a full Life Member for all intents and purposes.

Honorary Life Membership

Any person who has rendered outstanding service to the University of California or to the UCI Alumni Association may become an honorary Life Member upon election to such by the vote or written assent of two-thirds of the members of the UCIAA Board of Directors.

Golden Life Membership

Current Life Members of the Association can become Golden Life Members by upgrading with a tax-deductible qualifying gift of $250. Individuals who are in a Joint Life Membership must upgrade separately at $250 per person

MEMBERSHIP RATES

	Annual Membership	Life Membership	*Life Membership Installment Plan	Golden Life Membership
Individual	$60	$750	$800	$250 for current Life Members ——————— $1000 for General and Annual Members
Joint	$75	$950	$1000	N/A

*Life Membership installments range from 2 – 10 monthly payments and the installment option increases the overall price of Life Membership by $50 total per person.

UCIAA MEMBERSHIP TIERS & BENEFITS

	General	Annual	Life	Golden Life
Keep your UCI Gmail*	✓	✓	✓	✓
Forwarding Alumni Email Address (@alumni.uci.edu)**	✓	✓	✓	✓
Bi-Monthly Events Digest E-Newsletter	✓	✓	✓	✓
The Anteater Network: our flash mentorship and networking platform that makes it easy to find or be a mentor!	✓	✓	✓	✓
Personal Finance Discounts: Bank of America Anteater Cash Rewards program, AP Mortgage home buying workshops and alumni discount	✓	✓	✓	✓
Insurance Discounts: Mercer (life, health) and Nationwide (pet)	✓	✓	✓	✓
Health & Wellness Discounts: select gyms and spas	✓	✓	✓	✓
Exotic Travel Opportunities: AHI Travel	✓	✓	✓	✓
Car Rental and Parking Discounts: QuikPark (LAX) VIP, Avis, Budget	✓	✓	✓	✓
Hotel Discounts: Club Quarters Program	✓	✓	✓	✓
Personalized Membership Card		✓	✓	✓
Personalized Address Labels		✓	✓	✓
Access to PerkSpot: Nationwide discounts at your favorite retailers		✓	✓	✓
UCI Division of Continuing Education (DCE) Course Discounts: 25% off for the 1st course; 10% off one course per quarter		✓	✓	✓
UCI Campus Parking Discount: $2 off daily general or reserved rate (redeem at staffed kiosks only)		✓	✓	✓
Newkirk Alumni Center Room Rental Discount: 25% for Golden Life, 20% for Life, 15% for Annual		✓	✓	✓
UC Main Campus Library Book Borrowing Privileges		✓	✓	✓
UCI Division of Career Pathways (formerly Career Center): discounts on packaged services – 20% off Alumni OnePass		✓	✓	✓
Anteater Recreation Center (ARC) Special Rate - $60 off the annual rate		✓	✓	✓
Tiered Pricing and Access to Select UCI Events		✓	✓	✓
Discount on Hourly and Package Rates at Esports Arena: 25% for Life, 18% for Annual		✓	✓	✓
UCI Athletic Summer Camps Special Rates – 10% off		✓	✓	✓
EBSCO Online Research Database			✓	✓
Exclusive University Event Invitations			✓	✓
Custom-made Golden Life lapel pin				✓
Name and Golden Life status in UCIAA programs & Honor Rolls				✓

More information: engage.alumni.uci.edu/s/membership-benefits

*For alumni who graduated 2014 and on, special conditions apply

**For alumni who graduated prior to 2014

ROLE OF AN ALUMNI CHAPTER

WHAT IS A CHAPTER?

To meet the needs of an ever-expanding alumni population, an international network of dedicated alumni volunteers work together to represent the UCI Alumni Association in their local region, industry, cultural and academic communities.

UCI chapters play a vital role in the engagement efforts of UCIAA. They are an extension of the organization and are the connection at the local level. Chapters are critical partners in helping UCIAA achieve its mission to create a community of alumni that celebrate their alma mater, act as advocates for UCI, and help enhance the lives of UCI students. Chapters are essential in engaging our alumni.

GOALS OF CHAPTERS

1. **Connect:** Provide UCI alumni with a lifelong connection to both fellow alumni and to the University.
2. **Engage:** Provide diverse programming for the various interests of our alumni that foster the spirit of camaraderie.
3. **Promote:** Encourage the culture of Anteaters helping Anteaters by upholding UCI traditions and initiatives through supporting career development of students and alumni, participating in the Anteater Network, etc.
4. **Serve:** Support the Anteater community by volunteering in various opportunities such as mentoring students, participating in a committee, providing scholarships, etc.

BENEFITS OF BEING A RECOGNIZED CHAPTER

As a UCIAA board approved and chartered chapter, UCIAA will provide resources to promote your chapter's success. As a chapter leader, you will have the opportunity to share and grow your leadership skills, network with fellow alumni and support your alma mater's goal of building lifelong UCI relationships around the world.

Specific chapter benefits include:

1. **Stipend**: Officially chartered chapters receive an annual stipend based on the performance of the previous fiscal year's tier funding level to support chapter events, activities, and operations *(See Chapter Funding Checklist, page 55).*

2. **Access to UCIAA Staff**: Each chapter will have an assigned chapter liaison to provide guidance and support in chapter activities. The liaison serves as an active advocate for the chapter.

3. **Marketing:** The UCIAA marketing team will support the chapter in the use of UCI branding, the ability to send approved emails and invitations to alumni listed in the UCIAA database and access to branded social media accounts specific to the chapter and local audience.

4. **Event support:** Event planning support and resources including: event registration/online ticketing, on-site assistance (when available), events listing on UCIAA website and SWAG/giveaways. Your chapter liaison will provide access to a digital platform such as Zoom for chapter virtual events.

5. **Training:** All chapter leaders are encouraged to attend the annual Chapter Leadership Summit which provides exclusive training and networking opportunities. A bi-monthly conference call is also hosted to promote further training, foster communication between chapter leaders and receive university updates from UCIAA staff.

6. **Exclusive Opportunities:** Chapter leaders are often invited to exclusive events and other special opportunities throughout the year.

7. **SWAG:** UCI Alumni branded merchandise will be provided in varying and limited quantities for your use in community and brand building with your alumni. SWAG varies from year to year and may be periodically picked up from campus or shipped out to regional and international chapters by request. Chapters who have a minimum of two events as of April 30th may use up to 50% of their remaining stipend balance on predetermined SWAG. SWAG options will be provided by UCIAA. Chapters do have the option to purchase additional SWAG through the campus bookstore according to stipend restriction as referred to under the Chapter Operating Guidelines – Chapter Financial Support (page 25).

8. **Event Venue:** The Newkirk Alumni Center, opened in 2012, is the home for UCI alumni on campus. The building is equipped with meeting rooms, and event spaces of varying

sizes. Chapters are encouraged to use the Center for their activities. The Newkirk Alumni Center's business hours are Monday through Friday, 9:00 am to 4:00 pm. If you wish to host an event after-hours, the Center would be required to schedule staffing to oversee building operations (advance coordination required). The room rental and administrative fees are waived for any UCIAA chapter-affiliated events however any incurred labor costs will be relayed to the respective UCIAA Chapter and deducted from the Chapter's annual stipend. Please see Event Venue Rental section for detailed information. *(Page 28)*.

9. **Event Collaboration:** UCIAA regularly hosts events in Southern California and throughout the world, where our alumni live and work. During event programs, UCIAA often invites chapter leaders to be recognized or share the platform to discuss their initiatives. UCIAA also periodically hosts events in major alumni markets outside of Southern California, including the SF Bay Area, New York, Washington, D.C., Chicago, China, Korea and more.

CHARTERING A UCI ALUMNI CHAPTER

Alumni chapters generally begin with a small group of dedicated alumni. A chapter can provide many different opportunities, including serving as a social outlet for Anteaters and friends of UCI, creating pride and awareness in a community, raising funds for scholarships and providing networking and professional development opportunities for alumni and current students.

Chapters can be formed in one of two ways:

1. A group of UCI alumni take the initiative. Minimum of 10 alumni, including 5 chapter leaders.
2. Based on density of alumni in a particular geographic or industry, the Association takes the initial steps to form a chapter and seeks out alumni volunteers.

As of July 2023, the UCI Alumni Association is not chartering new chapters due to limited resources

STEPS TO BECOME A CHAPTER

Verification of Existing Chapter

Check the UCIAA website to ensure that the chapter you wish to start does not already exist. If there is not a formal chapter, contact the Association to begin the process of creating one.

Informational Meeting/Reception

The UCIAA Chapter Liaison assigned to your chapter will contact you to discuss the viability and responsibility of forming a new chapter. The Chapter Liaison will work with the volunteers to coordinate an informational meeting/reception with all alumni that fit the targeted demographic. At this meeting/reception, alumni can express interest in becoming a chapter leader.

Recruit Chapter Leaders

Once you have alumni interested in chapter leadership have them fill out the *Chapter Leadership Application (page 57).* Refer to the governance section of this handbook for more information on recruitment. *(Page 17)*

Alumni Chapter Charter Application

With the leadership board in place, complete the *Alumni Chapter Charter Application* which requires five chapter leaders and the first two events you plan to host. *(not currently accepting*

Formal Approval and Recognition

Now that you have your leadership team and the charter application has been submitted to your Chapter Liaison, you are eligible for formal recognition and chartering by the UCIAA Board of Directors. The Board of Directors meets quarterly and will consider your charter application for approval at the next board meeting.

Chapter Bylaws

During the application phase, your Chapter Liaison will provide you with your Chapter Bylaws which must be reviewed and approved by the chapter leadership board. Once the UCIAA Board of Directors approves your charter application, the bylaws will officially take effect. *(page 62)*

Security Use Form

Once your chapter has been officially chartered, each chapter leader must submit a signed *Security and Use Statement Form* which protects alumni data. *(page 60)*

CHAPTER LEADERSHIP POSITIONS

Chapters rely on great volunteers. A successful chapter needs a base of chapter leaders it can rely on to stay active and engaged. Active volunteers in the chapter keep the group current and energized and allow for the work to be divided amongst the leadership board. Volunteers are the lifeblood of the Association – our goals can't be met without you!

Chapters are required to have no less than five leaders. Each leader will have a term of two years and may not serve more than two consecutive terms in office in the same position without a one-year break in service. Below are job descriptions for the required chapter leader positions.

President

1. Provide overall leadership and direction to the alumni chapter.
2. Execute an annual plan and set goals in conjunction with your leadership board to support the mission of the Association. Submit by September 1st.
3. Supervise the coordination of the chapter's activities.
4. Attend chapter events and activities.
5. Preside over chapter meetings.
6. Exercise overall financial responsibility for the chapter and uphold university policies.
7. Encourage your full chapter board to attend the annual Chapter Leadership Summit.
8. Serves as primary contact for the Chapter Liaison.
9. With the help of the Vice President and Chapter Liaison create a succession plan for new chapter leadership.
10. Ensure board members are complying with deadlines of event and financial forms.
11. Encourage your full chapter board to attend the bi-monthly All Chapter Leaders Conference Call.

Vice President

1. Preside over meetings in the absence of the President.
2. Coordinate with the chapter president to advise all chapter leaders in the completion of tasks and responsibilities.

3. Serve as interim President, if necessary, during a presidential transition.
4. Record chapter meeting minutes, including approved expenditures that are within the University policies and distribute to leadership board and Chapter Liaison in a timely manner.
5. Maintain current roster of chapter leaders and submit updates to Chapter Liaison.
6. With the President, oversee the succession planning process.

Treasurer

1. Develop an annual budget and keep track of all financial revenue and expenses of the chapter.
2. Immediately work with payee on submitting chapter reimbursement within one week of an event. Keep copies of all invoices, receipts, etc. on file for at least two years.
3. Work with Event Chair to keep track of and manage event budget.
4. If applicable, work with Scholarship Chair to track scholarship donations.
5. Obtain board minutes stating the approval of the expense.
6. Keep the rest of the leadership board informed on the chapter's financial status.
7. Routinely reconcile Treasurer's report with UCIAA report.

Communications Chair

1. Strategize and implement social media and marketing campaigns for the chapter.
2. Ensure chapter marketing content is in compliance with the University of California communication policies. Policy 800-16, Part b14 (https://www.policies.uci.edu/policies/pols/800-16.php#partb14) and that the chapter adheres to the Association's branding guidelines. *(Page 44)*
3. If applicable, check chapter email inbox; respond and delegate responses as needed.
4. Oversee chapter social media platforms and maintain an active online presence to meet requirements on the Chapter Funding Checklist *(Page 55)*.
5. Provide social media login information to your Chapter Liaison. Assign your Chapter Liaison as an admin or moderator on all social media accounts to assist in continuity of content during leadership transition.
6. Encourage fellow chapter leaders to promote events to their direct networks and personal social media platforms.
7. Share UCIAA messaging on chapter social media platforms.

8. Ensure all social media platforms and websites (if applicable) are up to date with latest information (upcoming events, board directory, contact info, etc).

Events Chair

1. Work with chapter leadership board to design programs which appeal to the alumni group's diverse constituency and to plan the year's calendar of events. *Refer to Annual Event Planner.*

2. Inform Chapter Liaison of plans and activities by submitting a *Chapter Event Approval Request* for coordination through the UCIAA office. *(See page 56)*

3. Coordinate with Communications Chair to ensure proper lead time for communications promoting events and programs to alumni.

4. Oversee the planning of events including all logistics, in accordance with checklists and other tools provided. *(See Event Planning Section, page 29)*

5. Ensure that all events incorporate the mission and goals of the chapter and Association.

6. Complete post event tasks and reports by submitting sign in sheets, event photos, thank you email call to action items and event reimbursements to Chapter Liaison.

GOVERNANCE

BUILDING YOUR VOLUNTEER PIPELINE AND SUCCESSION PLANNING

The health of an alumni chapter often depends on a consistent flow of new volunteer alumni moving into leadership roles from year to year. Beyond the need to simply recruit new alumni, concerted effort must be paid to developing volunteer leaders in a pipeline so they have the recommended time and experience to take on larger leadership roles in service of the chapter. While succession planning is a formal responsibility of the President and Vice President, every chapter leader should have a hand in developing future chapter leaders. Here is an example of successful pipeline building:

- A new alumnus expresses interest in helping the chapter.
- The alumnus is asked to join a committee to make a measured, focused impact.
- After one or two years, that alumnus transitions into the committee chair of that area.

Establishing committees may also help the chapter meet its goals and support operations. Securing volunteers for sub-committee service (short-term and longer term projects) will build your pipeline for future volunteer leaders.

Below are some examples of chapter committees:
- Communications Committee
- Events Committee
- Mentoring Committee
- Recruitment Committee
- Scholarship Committee

If a chapter doesn't have committees, the entry level involvement could be leading a specific program, event or function, potentially including:

- Scholarship
- One or two annual events
- Mentorship program
- Direct alumni outreach

Best practices also include a shadow program, in which current chapter leadership board members mentor and train new chapter constituents with the intent to develop a successor.

Tips for Effectively Managing Committees

- Always be on the lookout for alumni who attend your events and programs and seek ways to involve new faces.
- Keep a roster of volunteers including their contact information and
- Assign projects and/or roles that fit a volunteer's special interest
- Promote teamwork so all volunteers feel supported.
- Say thank you to volunteers personally.
- Give public shout outs/thank you comments at your event.
- Send a handwritten note.
- Share the efforts of your volunteers through a posting on the chapter's social media platforms.
- Meet regularly with committees and encourage participation from all members.

CHAPTER LEADERSHIP RECRUITMENT AND APPLICATION

Active recruitment from the current leadership board members is highly encouraged. Recruitment should be a priority by all leaders throughout the year.

(Link to: Chapter Leadership Application)

The standardized timeline is:

- September – February: Chapter should be constantly meeting alumni at engagement opportunities and inquiring about their interest in becoming a board member

    o Promote committees that your chapter may have (mentorship committee, scholarship committee, event committee)

    o Include columns in your registration sign-in sheet that has a question if they are interested in leadership positions

- March – April: Chapter sets up their chapter leadership application and begins promotion

    o This may include an informational session for leadership interest, or an event with a recruitment promotion.

    o Active outreach to alumni in chapter's constituency by reaching out to alumni on past attendance lists, LinkedIn, AntNet, personal network, social media and more.

    o Each current leadership board member could be given a quota of alumni to connect with.

- May – June: Candidates are screened, chapter leadership votes on slate and appointments are made.

- July 1: New leadership board term begins. New board roster to be submitted to your liaison.

- August: New chapter leaders attend the Chapter Leadership Summit.

All candidates for chapter leadership positions must complete the chapter leadership application. A template application is available to all chapters and is appropriate for all chapter leadership positions. The application requirement serves to:

- Supply necessary contact and bio information about the alumnus.
- Give the applicant a sense of investment in the process of potentially taking on a leadership role and reflect on their goals for involvement.

CHAPTER LEADER APPOINTMENT

Chapter leader applications will be reviewed and discussed by both the current leadership and UCI staff to come to consensus on the best candidates for each position. The UCI staff will approve the final appointments for the leadership positions. All chapter leadership board positions will be appointed in this manner. Neither elections nor self-appointments are permitted under UCIAA guidelines.

TERM LIMITS

Term limits are in place to ensure chapter leaders are not tasked with sustaining the well-being and growth of a chapter indefinitely. It also paves the way for new alumni to get involved, provide fresh perspective, and make an impact on the chapter. It is important to note the commitment of a leadership role is two years, or up to four in most cases. This helps necessitate a focus on building a strong leadership pipeline and succession plan (see corresponding section). Term limit parameters are as follows:

- Leadership board members will have a term of two years in a position.
- Leadership board members may not serve more than two consecutive terms on the board (in any position) without a one-year break in service.
- Second term needs to be mutually agreed upon by incumbent, chapter board members, and UCI staff liaisons.
- The only exception for an extension beyond two terms is selection as an incoming President, in accordance with the standard position selection process.
- If an officer cannot fulfill his or her duties, the President may appoint a member in good standing as an interim officer until the next appointment. Interim positions do not count towards the two consecutive term limit.
- If a chapter has an ANTbassador, it is a good next step for former chapter leaders who would like to stay connected *(see ANTbassadors guidelines)*.

ANTbassadors Guidelines (formally advisory board)

ANTbassadors is a separate group from the chapter leadership board and serves as an optional, additional group of volunteers to provide connections for an alumni chapter. The framework for a successful ANTbassador model is as follows:

- ANTbassadors are not voting members of the chapter leadership.
- ANTbassadors may be invited to board meetings to provide additional perspectives in leadership discussions.
- ANTbassadors do not have a set meeting schedule but they remain engaged with the chapter leadership.
- Student leaders can be members of ANTbassadors for broader representation. UCIAA's Club Affiliate Program may provide connections to appropriate student candidates in a chapter's audience.
- ANTbassadors are considered alumni volunteers and will receive communications and invitations from UCIAA and the university.

CHAPTER & VOLUNTEER EXPECTATIONS

Our most successful chapters are deeply committed to advancing the goals and programs of the UCIAA and the University. They not only enthusiastically support the institution, they also are committed to becoming involved with alumni programs and work to obtain the support and participation of others. This is generally accomplished through the following:

Chapter Board Responsibilities

The Chapter Board Responsibilities outlines the responsibilities of chapter leaders, including the following:

1. Fulfill requirements as defined on the Chapter Funding Checklist by June 30

2. Support UCI Alumni Association engagement opportunities

3. Comply with all university policies pertaining to financial reimbursements, event planning, marketing/branding standards, etc.

4. Communicate regularly with your chapter liaison

5. Participate in chapter-related meetings and all chapter-hosted events

6. Make sound informed decisions, avoiding conflict of interest and acting in good faith and in the best interest of the organization at all times

7. Foster a sense of safety and belonging at all chapter activities

8. Be an ambassador of the UCI Alumni Association & promote the standard call-to-actions to Anteaters everywhere:
   • Get involved in a chapter
   • Be a mentor to current students or young alumni
   • Become a life or annual member of the UCI Alumni Association
   • Update your contact information
   • Make a gift to UCI

Event and Meeting Attendance

It is important that members of the leadership board actively participate in the programs and events sponsored by both the chapter and UCIAA. Chapter leaders should plan to attend their quarterly chapter meetings, the UCIAA bimonthly chapters' conference call and the annual

Chapter Leadership Summit. Additionally, the leadership board should actively participate in the UCIAA events, including UCI Homecoming, Giving Day, Dinners with Anteaters, Anteaters in Service Day and UCIAA Annual Meeting.

UCI Alumni Association Membership

Alumni who have been awarded a degree from UCI will receive complementary general membership to the Alumni Association. Alumni have an opportunity to enjoy enhanced benefits of the Association through payments for an Annual membership, Lifetime membership, or Golden Life membership. The Association's annual operating budget, including chapter stipends are supported by UCIAA membership dues. It is encouraged that each member of the Chapter Leadership board is an Annual, Life, or Golden Life member of the Association. It is also encouraged that chapter leaders and committee members assist the Association in growing its membership base by informing others about the importance and benefits of a paid membership.

Please note there is <u>no fee</u> to participate in a chapter.

CONTINUED RECOGNITION

Fully chartered chapters shall be regarded as permanent chapters who are eligible for uninterrupted delivery of benefits and services outlined in this document until such time they choose to self-dissolve or are found to be out of compliance with chapter guidelines.

PROBLEMATIC VOLUNTEER ACTION PLAN

Occasionally, a leadership board member, an Alumni volunteer, or general Alumni member may become a detriment to the success of an alumni chapter. This can be due to lack of participation, and/or conduct which includes but not limited to conflict of interest, gross negligence or unprofessionalism and ethical concerns. For leadership board members, please refer to Chapter Board Responsibilities p.

If this occurs, the rest of the chapter leadership and the staff liaison should work with that board member, volunteer, or general alumni member in order to improve the relationship. If unsuccessful, removal from the position is a potential next step. The following step-by-step plan

should be enacted.

1. Chapter President consults with the staff liaison
2. President and liaison create a win-win time-bound plan for the volunteer which outlines steps to get back on track in good standing with the chapter.
3. If the volunteer continues to be problematic after the time-bound plan expires, the volunteer can be removed from the position involuntarily. This shall be done in agreement between the President and the staff liaison.
4. The staff liaison will work with the volunteer to explore other alumni engagement opportunities at UCI which may be a better fit, to continue the active relationship.
5. If the President is the volunteer in question, this process will be undertaken by at least two other leadership board members in good standing in conjunction with the staff liaison.

CHARTER REVOCATION

The Chapter charter may be revoked by majority vote of the UCIAA Board of Directors upon the occurrence of any of the following:

1. Failure to comply with the University policies and requirements set forth within the bylaws.
2. Taking any action detrimental to the University or the Association.
3. Any unauthorized or improper use of the Association's name, stationery, mailing lists, tax identification or unlawful behavior.

CHAPTER OPERATING GUIDELINES

OFFICIAL REPRESENTATION

Chartered chapters and their constituents serve as representatives of both UCIAA and the University. This brings with it the responsibility of ensuring individuals and chapter programs present a positive and professional image of UCI. Chapters are expected to fulfill the purpose stated in their chapter bylaws. Chapter policies and procedures shall be consistent with UCIAA and University mission and values.

USE OF THE UNIVERSITY NAME, OTHER ALUMNI NAMES AND MARKS

UCI Alumni Association is the official representative body of the alumni of UCI, as defined by the UC Regents. Alumni chapters may not label themselves as "alumni associations" as they are part of the one official UCI Alumni Association. Furthermore, only official alumni chapters, as recognized by UCIAA, may use the name of the university. Chapters must follow the UCIAA's Brand Guidelines and policies pertaining to the use of said marks.

CHAPTER ROSTERS AND FORMS

Chapters shall submit to the Chapter Liaison an official list of current officers and volunteers upon request from the UCIAA or Chapter Liaison. If changes in the roster occur it is the responsibility of the chapter to update their Chapter Liaison. Official chapter contact information for use in publications and other communications will be drawn from these lists.

MINIMUM LEADERSHIP FOR CHAPTER STATUS

Chapters shall maintain a minimum number of five active officers to remain chartered and receive benefits. If the chapter is unable to maintain five active officers, then the remaining officers should be in collaboration with their liaison to actively recruit for those vacancies.

CHAPTER FINANCIAL ACCOUNTING AND REVENUE

Formally chartered chapters are covered under UCIAA's non-profit 501(c)(3) status. The chapters' funds are managed and distributed by the UCIAA financial department. Chapters are expected to operate on a break-even basis. The chapter treasurer will keep an accounting of revenue and expenses for the year. All reports and documents will be sent quarterly to your chapter liaison to be reconciled with the UCIAA financial department.

EXPENSE PRE-APPROVAL

All chapter expenses should be submitted for pre-approval via the Chapter Event Approval Request form. Expenses that are not pre-approved may not be eligible for reimbursement. Please view our Event Timeline for when you should submit for pre-approval *(Page 56).*

CHAPTER FINANCIAL SUPPORT

Stipends will be allocated by UCIAA to all recognized chapters every year on a fiscal year basis. The University's fiscal year is July 1 - June 30. Funding is available to recognized chapters in compliance with chapter bylaws and completed tasks in the corresponding tiers.

Tier 1 Funding: $1,000

Tier 2 Funding: $1,500

Tier 3 Funding: $2,000

Chapters will receive funding based on the previous year's performance in accordance with the accomplishments of each tier. Newly chartered chapters will begin with tier 1 funding. *(See Chapter Funding Checklist page 55)*

Please remember that all chapter programs should operate as close to break-even as possible. All funding support is built to help chapters reach that goal. Unused stipend funding **cannot** "roll over" into the next fiscal year. Chapter funds generated from event income and donations to the chapter will roll over to the next fiscal year. *(See Chapter Funding Checklist, page 55)*

REIMBURSEMENT PROCEDURES

To ensure timely reimbursement, it is crucial to submit reimbursement requests within one week of the event date. University financial procedures require each reimbursement to pass through an average of 7-9 levels of approval before a check is issued and mailed, which usually takes several weeks. Therefore, it is important for chapters to submit the necessary documents promptly. Reimbursement requests that are submitted late will be considered delinquent and may not be reimbursed. According to university policy, a document is labeled as "delinquent" if it is not marked as "final" within 45 days of the event date. "Final" reimbursements are those that have completed all approval levels and a check has been issued.

Individual Reimbursements

Chapter leaders may pay for certain event-related expenses out of their own pocket. These expenses include catering, supplies, decorations, shipping materials, and postage, and can only be paid using a credit or debit card. However, expenses such as website fees, online platforms, subscriptions, and others must be paid by UCIAA staff. For any reimbursement requests, chapter leaders need to follow the process outlined below:

Within one week of the event date, submit the following items to your chapter liaison:

- Submit through our online Reimbursement Form

- Copy of the paid receipt that provides a detailed breakdown of the expenses, including sales tax information.

    o In some cases, two different receipts may be required:

    o (1) Invoice showing the balance due, and (2) showing the balance paid off with last 4 digits of CC used.

    o *or* (1) showing detailed Itemized receipt and (2) Credit Card receipt showing last 4 digits of cc used.

- An attendee list for the event, including first names, last names, and email addresses of the attendees.

- Proof of the event, such as an event flyer, email invitation, agenda, or a screenshot of the Facebook event.

Your Chapter Liaison will work with you if additional paperwork is required.

Please note that alcohol expenses must be separated from other expenses and cannot be reimbursed by the university. Additionally, catering expenses must comply with the university's policy on meal maximums per person per event shown below. Remember to coordinate with your chapter liaison for all reimbursement-related matters.

Vendor Approval & Payment

The Vendor Approval & Payment process involves several steps to ensure compliance with university policies and to facilitate payment to vendors.

<u>Notification:</u> Before conducting any business with a vendor (such as a photographer, DJ, equipment rental company, etc.), inform your Chapter Liaison.

<u>Payment by UCIAA:</u> Vendors can only be paid by the University. It is against university policy for individuals to directly pay vendors.

<u>Vendor On-boarding:</u> Your Chapter Liaison will check if the vendor is on-boarded with the university, which means they have a vendor profile in the University Accounting system. If not, an on-boarding request will be submitted, and the vendor will need to complete an online form, providing their social security number or tax ID number.

Timeframe: Keep in mind that it may take several weeks to on-board a vendor, depending on their response time.

<u>Purchase Order (PO) Process:</u> Once the vendor is on-boarded, your chapter can work with your Chapter Liaison to initiate the PO process. Only UCI staff can start this internal process, which may take up to 6 weeks for approval by UCI's Central Procurement Office.

<u>Approval by UCI Procurement Department:</u> It's important to note that vendor on-boarding does not automatically grant approval to engage in business with that vendor. The UCI Procurement Department has the final say in determining if the vendor meets all requirements and policies. They may even suggest using a different vendor.

<u>Service is provided:</u> After the PO is approved, your Chapter Liaison will notify you that you can start doing business with the vendor.

<u>Vendor Invoice and Documentation:</u> Upon completion of the vendor's service, provide the vendor invoice to your Chapter Liaison for payment by the Alumni Association. Additionally, you will need to submit other documents such as an attendee list or proof of the event.

By following these steps, you can ensure that vendors are properly approved, and payments are made in accordance with university policies.

MEAL MAXIMUMS PER PERSON

The below chart is the maximum cost per person allowed for event reimbursements.

Meal Type	Maximum per person
Breakfast	$31
Lunch	$54
Dinner	$94
Light refreshment	$22

Current maximums come from UC Policy BUS-79 and were updated effective July 1, 2022.

NOTE: **Per-person meal expense is for an entire event:**

- **Includes:** Pre-meal items (e.g. beverages and hors d'oeuvres), meal, labor, sales tax, delivery charges and other service fees.
- **Doesn't Include:** Room rental and setup fees, media rental fees, decorations and other non-meal expenses.

UCI reimbursement and meal rates policy can be found at:

http://www.accounting.uci.edu/travel/entertainment/meal-maximum.html

ACCEPTING PAYMENTS AND DONATIONS

Event ticket payments and general donations will be accepted through the UCI Alumni Association's website, and the chapter will incur any applicable credit card fees. Cash is not accepted for payments nor donations.

EVENT VENUE RENTAL

The Newkirk Alumni Center, opened in 2012, is the home for UCI alumni on campus. The building is equipped with meeting rooms, and event spaces of varying sizes. Chapters are encouraged to use the Center for their activities. The Newkirk Alumni Center's business hours are Monday through Friday, 9:00 am to 4:00 pm. If you wish to host an event after-hours, the Center would be required to schedule staffing to oversee building operations (advance coordination required).

The room rental and administrative fees are waived for any UCIAA chapter-affiliated events however any incurred labor costs will be relayed to the respective UCIAA Chapter. Additional labor costs may include (but not limited to): after-hours staffing, labor-intensive/complex room setup and breakdown, and/or a dedicated AV staff member in the room throughout the event.

The Center's event space availability is not guaranteed and books up quickly therefore we encourage Chapters to book the space as far in advance as possible. Submit your Chapter's request via this online form; the form prompts for event details needed to determine availability and our Venue Events Team will respond to your inquiry within 24 business hours. Additionally, please notify your Chapter Liaison so they are aware of the event request.

EVENTS AND ACTIVITIES

Chapters are expected to plan events, hold meetings and promote Association events and/or otherwise engage their constituency in the stated purpose of the chapter bylaws. The type of events or methods of engagement should be in alignment with the Chapter Funding Checklist. It is the responsibility of the chapter to submit a *Chapter Event Approval Request* in a timely manner when planning an engagement opportunity.

CHAPTER LEADERSHIP MEETINGS

Chapter leadership must meet at least once a quarter and invite their chapter liaison. Meetings must be open to the alumni community and notes or minutes must be recorded and shared with the Chapter Liaison within two weeks of meeting.

POST EVENT REPORTING REQUIREMENTS

Following an event, chapters shall submit the following items to their Chapter Liaison within 72 hours of the event/activity:

- Event attendee list/sign in sheets
- Event photos
- Event reimbursement requests (due within one week of event date)
- If applicable, survey questions and call-to-actions

It is significantly important to submit sign-in sheets so you chapter can get credit for all of your activities, plus participants are recorded to track their activity and to keep their information up to date in the University database. Use of the alumni contact information must comply with the *University Advancement Security and Use Statement* and not for unauthorized purposes or for purposes outside of the scope of the mission of UCIAA. *(See page 60)*

CHAPTER LEADERSHIP SUMMIT

The annual Chapter Leadership Summit is a summer conference for alumni chapter leaders to receive training, resources, and tools to effectively and successfully lead their chapters. It also provides chapter leaders with the opportunity to network and exchange best practices with each other. The day involves a variety of staff led trainings and presentations as well as breakout sessions for chapter planning and/or collaborations. The summit closes with the Annual Chapter Awards recognizing our top performing chapters for the year. Chapter Board participation is required at the Chapter Leadership Summit.

EVENT PLANNING

SUBMITTING THE CHAPTER EVENT APPROVAL REQUEST

All events must be pre-approved by the UCI Alumni Association prior to any planning, marketing, or expense usage. Chapter events will be reviewed by the UCI Alumni Association to ensure the best alignment of resources for University initiatives and to prevent conflicts, and duplicate events.

Link to: Chapter Event Approval Request

**Events with free admission should be submitted 8 weeks prior to event date.

**Events with paid ticketing, or a donation element should be submitted 12 weeks prior to event date.

SCHEDULING EVENTS

Chapter leadership is encouraged to meet in early summer to discuss plans for the upcoming year's events. It is suggested to create an annual calendar that all members can reference. By planning events well in advance, chapters can ensure enough time is allowed for:

- Adequate planning and marketing
- Food and venue reservation
- Preventing conflicts with holidays, local events and UCIAA events.

When deciding on a date and time, be mindful of holidays (including religious holidays), local events and external factors like traffic. Try to pick a date/time that is convenient for the majority of the individuals you hope to attract to the event. Chapter Leadership should attempt to attend all chapter events.

EVENT FOCUSES

Plan a diversified calendar of events that will appeal to a cross-section of your group's alumni base. Consider establishing a signature event that anchors your alumni programming during the year and that becomes a tradition for alumni in your area. Keep in mind chapters must satisfy specific event requirements as detailed on the *Chapter Funding Checklist. (See page 55)*

Event Focuses:

- Student Support – Open the event invite to undergrad, grad, and alumni. Focus on relationship building between Alumni & Students through resource sharing and knowledge sharing around career topics, lifestyle topics, etc. Engage with students to promote the chapter and encourage them to get involved after they graduate.

- Alumni Career Development – Design events that engage alumni to help fellow alumni with their careers. Look at development in different stages: breaking into a field, middle management, and senior level positions.

- Collaboration – Increase the exposure on campus by collaborating with Academic Affairs and Student Affairs. Leverage pre-existing events held by these units and offer support where appropriate.

- Community Engagement – Develop a sense of belonging and increase exposure with the surrounding community by participating in local events

EVENT PLANNING TIMELINE

Setting the Dates

The ideal time to set dates for programs and events is at the beginning of the fiscal year (July). Even if your organization is not able to determine the exact date, at least establish the month for each program for planning purposes. Contact the Chapter Liaison for UCIAA events calendar to avoid conflicts when setting your dates.

12 Weeks Prior to Event with paid ticketing, or donation element

OR

8 Weeks Prior to Event with free admission

- ☐ Select date based on speaker, host and venue availability.
- ☐ Ensure date does not conflict with major University events.
- ☐ Submit completed *Chapter Event Approval Request* to your Chapter Liaison. *(See page 56)*
- ☐ Secure venue. Please submit any legal contracts to your Chapter Liaison to secure the appropriate approval and signatures from UCIAA leadership. Submit Newkirk Rental request.
- ☐ Request approval for budget based on venue, catering expenses and other event logistics.

6 Weeks Prior to Event

- ☐ Develop communications/marketing plan.
- ☐ Prepare content for communications and forward to Chapter Liaison, including possible images or graphics (Refer to graphic creation requirements)
- ☐ Your Chapter Liaison will coordinate emails, online registration forms and UCIAA website postings.
- ☐ Once UCIAA marketing begins, chapter can begin to promote program via social media and personal networks.

3 Weeks Prior to Event

- ☐ Work with your Chapter Liaison to develop an event program and call-to-actions.
- ☐ Continue to promote program via social media and personal networks.
- ☐ Monitor event registrations.
- ☐ Consider asking each chapter leader personally invite two new alumni to event.

1 Week Prior to Event

- ☐ Continue to promote event via social media and personal networks.
- ☐ Monitor event registrations.
- ☐ Prepare event sign in sheets, interest forms* and name badges* (can be done by liaison).
- ☐ If applicable, provide your Chapter Liaison with any information that should be included in the event reminder email (typically sent to registrants 1-3 days prior to event).

*Suggested for larger, more formal events

At the Event/Program

- ☐ Track all attendees as they arrive and record no-shows and those who "walk in" without prior registration.
- ☐ If the event is a paid event, collect "walk-in" registration payment by encouraging attendees to register online using their mobile phones.
- ☐ Identify guests who would be prospective volunteers for your chapter!
- ☐ Take photos for post event follow up (include candid and group photos).
- ☐ Consider live streaming the event on the chapter's social media.
- ☐ Share call-to-actions with attendees (either through event program or individually).

After the Event/Program

Supply your Chapter Liaison with the following:

- ☐ Send final list of attendees and no-shows.
- ☐ Send event photos.
- ☐ Send reimbursement requests <u>within one week of event date</u> through the digital Reimbursement Form. Once all required documentation is received and approved, reimbursements can take approximately 3-4 weeks to process.

If applicable, Chapter Liaison will coordinate a post event thank you email to event attendees. Ideally, email will include event photos, call-to-actions and post event survey.

EVENT SPONSORSHIP

Chapters can seek sponsorships from local businesses, companies and/or individuals to help offset costs for a chapter event. <u>Sponsorships or donations should be discussed with your chapter liaison</u> for review to ensure compliance with University policies and there is no conflict of interest present. Sponsors may provide door prizes, event supplies or a monetary gift. In return for providing gifts or services, they can receive gift-in-kind recognition from UCI. Please complete and submit the *Gift-in-Kind Form*. Your Chapter Liaison can provide you with the form. Sponsorships are great ways to further fund chapter events and support the University. Sponsors can be recognized through event marketing materials, as part of the event program and/or on social media pages. (Excluding alcohol sponsors)

Sponsorships for major UCIAA alumni events (i.e. UCI Homecoming, Lauds & Laurels, etc.) are managed separately; please direct these to the UCIAA Director of Business Development.

CHAPTER EVENT APPROVAL REQUEST

Chapters must submit a *Chapter Event Approval Request* for all events prior to any planning or expense usage.

Once the form is submitted, UCIAA will:

- ☐ Create an online event registration page, if requested.

- ☐ Advertise the event to your chapter's demographic via official emails, if requested.
- ☐ Include the event on the UCIAA website's events page and event digest emails.

☐ Process all necessary paperwork to comply with UCIAA and University policy (i.e. project charter, event insurance, campus alcohol request form, exceptional approval form, etc.).

The Chapter Event Approval Request asks for all relevant event details, including:

☐ Date, time, location, description* and category of event
☐ Registration details and fees
☐ Event budget and expected expenses
☐ Contact information for the chapter event coordinator

ESTABLISHING THE EVENT REGISTRATION FEE

While chapters receive funding from the UCIAA, this annual allocation is to be used to support and supplement your overall engagement activities and programs for the fiscal year (July-June). This allocation can go a long way with effective planning.

If your event has costs associated with it, it's necessary to assess an event registration fee for alumni activities for two important reasons:

1. To help cover the cost of the activity.

2. To add value to the activity. People are more likely to be a "no show" at a free event than one they paid a registration fee.

There are many things to consider when establishing an event registration fee:

☐ Venue rental
☐ Food and beverage
☐ Aventri credit card processing fees
☐ Service fee and gratuities
☐ Additional fees such as bartender fee or corkage fee
☐ Parking
☐ Décor
☐ Audio-visual and digital tools
☐ Printing for programs or signage
☐ Scholarship funding opportunity

Online Registration

UCIAA can build and maintain an online registration form for your chapter's event. For free events, the Association will set up your event registration on Eventbrite. If your event has a registration fee associated with it, the Association has an established, secure ecommerce event platform called Aventri, which can collect online credit card payments. Once the online registration is closed for the event, the funds received are attributed to your chapter's revenue account and are used to pay your organization's event costs. Your Chapter Liaison will keep you updated on the status of revenue received and expenses paid.

NOTE: Aventri fees and credit card processing fees will be deducted from your event's ticket revenue.

VIRTUAL PROGRAMMING

Virtual events are a great way for chapters to expand their reach and engage their constituency outside their local region. Chapter virtual events can be hosted on the Alumni Association's enterprise Zoom account which allows for up to 300 attendees in Meetings and up to 500 attendees in Webinars with an unlimited number of minutes. Please submit a Chapter Event Approval Request for your virtual event at least 10-12 weeks in advance and your Chapter Liaison will set up your Zoom meeting or webinar for you.

Zoom Meetings vs. Webinars

Zoom Meeting and Webinar platforms offer similar features and functionality but have some key differences.

Meetings are designed to be a collaborative event with all participants being able to screen share, turn on their video and audio, and see who else is in attendance. Essentially, Zoom Meetings is ideal for hosting interactive sessions with audience participation and if you want to split up the group into smaller break out rooms.

Webinars are best for lecture or panel style events. They are designed so that the host and any designated panelists can share their video, audio and screen. Webinars require little to no interaction with attendees and are often set up as view-only for attendees.

Zoom Features

Zoom Meetings and Webinars provide a variety of features to enhance your virtual events. Some notable features include registration, polling questions, live streaming, chat box, video recording, and much more. Webinars offers some additional features such as panelist role option, email reminders (if registration is enabled), and a Q&A function.

For full details on Meeting vs. Webinar comparisons and respective features, please visit here: https://support.zoom.us/hc/en-us/articles/115005474943-Meeting-and-webinar-comparison

CHAPTER SCHOLARSHIPS

Scholarships are essential in recruiting excellent students to UCI. The annual estimated academic budget for undergraduate students continues to rise. With approximately 50% of UCI's student population coming from first generation homes, scholarship opportunities are crucial for their success. As such, the Association is encouraging each chapter to raise funds to support student scholarships. Also, alumni giving is an essential component of our U.S. News & World Report rankings. We need to keep raising our rankings!

Every year, chapter leaders are encouraged to establish fundraising goals for their organization. Short-term and long-range goals are ideal and lead to best success. Annually, these goals will need to be communicated to your Chapter Liaison **by January 31.**

To help you with this worthy endeavor we have set up an easy 1, 2, 3 process.

STEPS TO CREATE AND FUND A SCHOLARSHIP

Step 1 – Set Your Goal by March 1
Each chapter can decide which of the following best fits the goal for their group. Scholarship support levels are as follows:

> **Level 1- Book Scholarship:** Chapters can award scholarships ranging from $500 to $1500. We encourage chapters to award larger amount scholarships to help with the increased cost of living on our students. Chapters can raise multiple Level 1 scholarships, up to three, for the same student or award a level 1 to different students.

Level 2- Scholarship Endowment: Establishing a chapter endowment will help future scholars into perpetuity. A UCIAA staff member can discuss the details of endowments once the chapter is at this level of fundraising. **A minimum of $25,000 is needed to establish an endowment.**

Step 2 – Establish Scholar Criteria and Select (3) Scholarship Readers by Mid-May

Scholar Criteria: Chapter members will need to establish the criteria of their scholarship - what matters most to the chapter: interest, leadership potential, merit, academic achievement and region. See *Official Policy* section for Prop 209 restrictions. *(See page 40)*

Chapter Scholarship Readers: The Alumni Association has an established scholar selection process. A chapter shall select three readers to serve on the scholar selection committee for their specific scholarship. Notify your Chapter Liaison of your representative selection.

Step 3 – Fundraise!

UCI Giving Day - Every spring UCI has a university-wide day of giving called Giving Day. Visit http://givingday.uci.edu to view last year's campaign. Chapters are encouraged to use UCI Giving Day as a vehicle to draw awareness of your chapter's scholarship efforts. Each chapter will have its own Giving Day page to receive donations and track participation. This is a fun and easy way to raise funds for your alma mater. It fosters a sense of community with other Anteaters and creates a little friendly competition between chapters.

ZotFunder – Chapters can now fundraise year-round for their chapter scholarship through a special platform called ZotFunder. Separate from Giving Day pages, each chapter can establish their own page, similar to a crowdfunding site, that can receive and record donations. We can even assign a text to give function which is a perfect way to raise scholarship funds during an event. Your Chapter Liaison can assist you with setting up an account.

For auditing purposes, cash donations are not accepted by UCIAA. Physical checks with chapter's name in the memo section are a great non-electronic way to give.

Step 4 - Celebrate!

Your scholar can come to a chapter meeting or event to meet your donors. Or the chapter can attend our annual Scholar Dinner in October/November to hear wonderful testimonials from all of the UCIAA scholars.

SCHOLARSHIP TYPES

Book Scholarships

Book scholarships provide meaningful student awards of $500 – $1,500 per year. Funds are placed directly into student accounts and are not tied to their financial aid packages as course materials are often purchased both on and off campus depending on resource availability.

Academic Scholarships

Merit based scholarships are larger student scholarships awarding a minimum of $1,500 per year. Funds directly support academic expenses for students which include tuition, class enrollment, fees, etc. Awards are placed into student financial aid accounts and are tied to their financial aid packages.

OFFICIAL POLICY

Policy Regarding Awarding Student Scholarships – California Proposition 209

Proposition 209 is a California ballot proposition which, upon approval in November 1996, amended the state constitution to prohibit state governmental institutions from considering race, sex, or ethnicity, specifically in the areas of public employment, public contracting, and public education. It states that "the University may make financial aid decisions and awards that are not based on any of the protected characteristics (race, ethnicity, color, national origin or sex)."

Chapters may develop scholarships awarding students living in a particular region (e.g. Los Angeles, Orange County) or focusing on a specific area of study (e.g. engineering, arts).

Culturally based chapters may award scholarships if the selection criteria is not based on a protected characteristic. For example, one chapter has established qualifications that include the following:

> *"The recipient of this scholarship must be a full-time undergraduate student who has demonstrated a consistent commitment to the community through*

his/her involvement on campus."

CHAPTER SCHOLARSHIP REQUIREMENTS

UCIAA must be notified in writing each year of a chapter's intent to award a scholarship by Mid-May. Official date sent by Chapters Team.

The award amount and any additional qualifications, in addition to what is included in the UCIAA Endowed Scholarship qualifications, must be included in the chapter's "Statement of Intent to Award" (SIA). An example of an SIA:

> *"The Los Angeles Alumni Chapter would like to award one $500 book scholarship for the 2021-22 academic year to a student living in Los Angeles County."*

IMPORTANT: This scholarship must be approved by UCIAA in order to proceed with selection as there may be additional campus policies to consider before approving award.

At the time the SIA is submitted by the May deadline, chapters must:
- Have the full award amount intended to distribute in their account ready to use.
- Provide the account from which the award will be taken.
- Have one point of contact who acts as chapter scholarship liaison to UCIAA.

For chapters participating in scholarships awards, at least two chapter readers participate in the UCIAA Endowed Scholarship Selection Committee summer selection process. These participants and their contact information must be submitted to UCIAA **no later than July 1.**

ELIGIBLE STUDENT REQUIREMENTS FOR SCHOLARSHIP

Chapter scholarship selections will be conducted in the summer simultaneously with the incoming student UCIAA Endowed Scholarship selection.

Qualifications include:

- Student must be an incoming freshman or transfer student who has submitted their "Statement of Intent to Register" (SIR) to UCI.
- Student must have completed a UCIAA Endowed Scholarship Application and submitted by the application deadline.
- Freshmen students are required to have a 3.65 unweighted GPA
- Transfer students are required to have a 3.65 GPA and the equivalent of 90 transferable quarter units.
- Additional chapter qualifications (if relevant). This includes regional specifications, major requirements, etc.

IMPORTANT: Scholarships will only be awarded to full time UCI students who intend to complete an entire academic year.

SCHOLARSHIP TIMELINE

DATE	ACTION
January	Communicate fundraising goal to Chapter Liaison. Create fundraising strategy.
April	Giving Day Participation
Mid-May	**Chapter submits SIA in writing to UCIAA.**
July 1	Chapter submits the names and contact information of their two scholarship readers to UCIAA.
June/July	Incoming UCI students invited to apply for UCIAA Endowed Scholarship. Applications will be shared with chapter scholarship liaison to share with interested applicants.
August	Student scholarship application process begins.
	Chapter submits scholarship recipient award letter template to UCIAA.
September	Scholarship recipients are selected. UCIAA Endowed Scholarship recipients will be selected first. Chapter scholarship recipients will be selected second.
	Student recipients will be vetted with OFAS to confirm eligibility.
	Chapter liaisons will be notified of students selected for chapter scholarships.
	Students notified of scholarship selections.
	Awards placed in student accounts for use.
October/ November	UCIAA Scholars Dinner honoring and celebrating our student scholarship recipients. Chapter representatives are welcome to participate and will be invited to the event.

AWARDING REQUIREMENTS

UCIAA/Office of Financial Aid and Scholarships Requirements:

UCIAA processes all undergraduate student scholarships through the Office of Financial Aid and Scholarship (OFAS). In order to process student scholarships, UCIAA/OFAS requires the following:

- Completed UCIAA student scholarship application
- Student's full information
- SIA from Chapters approving scholarship
- Award letter from chapter to student notifying them of award

NOTE: Policies and procedures are subject to change based on university protocols and requirements. Contact your UCIAA Chapter Liaison for questions.

MARKETING & COMMUNICATIONS

The UCIAA marketing and communications team (MarCom) is responsible for distributing all communication that aligns with the UCIAA's strategic goals. This messaging focuses on alumni engagement, whether that be sharing information about the University, advertising UCIAA initiatives and events to increasing membership and social conversations. Creating and sharing engagement avenues and opportunities is the primary goal of all UCIAA communications.

UC IRVINE AND UCIAA BRAND STANDARDS

UCIAA assumes the role and the voice of the trusted friend within the UCI family and all audience segments.

As the trusted friend, the UCIAA brand and voice is:

- Welcoming
- Positive and reassuring
- Respectful and respected
- Unassuming and accessible
- Cool but not aloof.

The UCIAA brand shows strength of character and is a vibrant collaborator within the UCI family brand.

All chapters are required to maintain UCI and UCIAA brand standards.
- UCI Brand Guidelines: https://p.widencdn.net/sjwdpw/Brand_Guidelines_V9pt1_11_19
- UCIAA Brand Guidelines: https://alumni.uci.edu/docs/UCIalumni_brand_guide_2017.pdf

Look and Feel

Clean, contemporary with lots of white/negative space. Polished with professional typographic treatment, compelling photography and engaging stories.

Voice

Most importantly, the UCIAA brand evokes and incites the pride, spirit and intellect of UCI's alumni, thereby eliciting the desire of all alumni to engage with UCI through UCIAA, enthusiastically adopting and propagating the Anteater for Life ethos.

Our voice is welcoming, familiar, knowledgeable, enthusiastic, encouraging, nurturing, empathetic, curious, interested and genuine.

- **Make It Accessible** - While UCI is home to many kinds of specialized knowledge, each with its own distinctive vocabulary, our general communications should speak in an articulate way that is accessible and understandable to a general audience. Avoid jargon or technical language. Steer clear of over-used buzzwords. Aim to sound intelligent, but never stuffy or pretentious. Most importantly, keep your audience in mind and always craft your language to connect with them and foster understanding.

- **Keep It Conversational -** While you may aim for an academic writing style in professional publications, a conversational tone is key for a general audience. Keep sentences concise. Don't use more words than is necessary. Maintain an active tone, not passive. Ask yourself, "Would this sound natural if I said it in conversation?" If not, simplify what you have to say.

- **Be Inspiring -** A sense of optimism is central to our brand. The ingenuity and pioneering spirit that we embody should inform every communication. Underlay everything we say in a simple message: anything that we can envision and imagine, we can accomplish.

- **Tell the Story –** It is usually easier to relate to a narrative of some kind as opposed to an abstract idea. So where possible, show, don't tell. Be specific and concrete. Bring a person or chapter to life by sharing their struggles and achievements. What figurative 'monsters' did your chapter have to overcome? What values do you count as a 'treasure' worth defending and protecting? What does your chapter fight for? Give specifics, add details for color, and try to paint a meaningful picture that people can

relate to.

- **<u>Illustrate our Impact</u> –** The UCI brand is all about "Illuminating the differences that make a difference." There are a multitude of ways to do this – through a story, a quote, a fact, an allusion. Our goal is to engage our viewers and readers in moments that surprise them with something they didn't expect – a new way of seeing the world.

Graphic Downloads

Master brand UCI templates were produced to assist in the creation of advertisements, postcards and other materials. If possible, it is recommended that these be used to maintain the UCI look and feel. Any additional UCIAA Graphic templates are available upon request made to the marketing team.

Image Resources

Public images of UCI are available on the UCI Flickr account (http://flickr.com/ucirvine) and the UCIAA Flickr account (http://flickr.com/uciaa). For historical photos, the Online Archive of UCI History is a digital archive created by the UCI Libraries to preserve and make available for research core historical records of the university. Included are audio and video recordings, films, photographs and slides, and publications from 1959 forward. Visit: http://ucihistory.lib.uci.edu/

Typography

The primary typeface of UCI is *Kievit Slab OT*. However this font is not free, so use of the secondary free fonts are options to consider when designing graphics for marketing purposes. The secondary typeface options include Helvetica, Arial and Cambria. Arial is always used for digital/web applications.

Color Palette

The primary color palette consists of blue and gold. Black and white should be used on all design and marketing materials. Colors from the secondary palette may be used as complements to the primary palette. Please use black (not lighter black or gray) for body text to comply with accessibility requirements.

What color setting should you use?

- Print Materials – PMS (aka Pantone Matching System) or CMYK
- Digital Materials – RGB or HEX

Primary

UCI BLUE / PMS 7685	CMYK: 93/73/11/1 RGB: 0/100/164 HEX#: 0064A4
UCI GOLD / PMS 109	CMYK: 0/16/100/0 RGB: 255/210/0 HEX#: FFD200

Secondary [used in conjuction with our Primary palette]

LIGHT BLUE (SECONDARY) PMS 549	CMYK: 60/24/21/0 RGB: 106/162/184 HEX#: 6AA2B8
LIGHT GRAY (SECONDARY) PMS 400	CMYK: 23/21/26/0 RGB: 197/190/181 HEX#: C6BEB5
DARK BLUE (SECONDARY) PMS 654	CMYK: 100/84/31/17 RGB: 27/61/109 HEX#: 1B3D6D
ORANGE (SECONDARY) PMS 715	CMYK: 0/54/93/0 RGB: 247/141/45 HEX#: F78D2D
LIGHT YELLOW (SECONDARY) PMS 100	CMYK: 5/1/76/0 RGB: 247/235/95 HEX#: F7EB5F
DARK GRAY (SECONDARY) PMS 425	CMYK: 65/56/53/29 RGB: 85/87/89 HEX#: 555759
LIME GREEN (SECONDARY) PMS 390	CMYK: 30/0/100/0 RGB: 182/189/0 HEX#: B6BD00

Editorial Style – AP Writing Style

The Associated Press Stylebook and Reference Manual serves as our primary reference for word usage, spelling, grammar, capitalization and punctuation. Where discrepancies exist, the UCI Editorial Style Guide takes precedence. Strategic Communications has compiled a master style guide to help achieve a consistent image across the variety of written communication materials that represent UCI, including brochures, news releases, periodicals and websites. Visit: https://communications.uci.edu/campus-resources/styleguide/index.php

PETER THE ANTEATER GRAPHICS & MONOGRAM

Peter the Anteater helps to foster school spirit and offers a way to express UCI's culture and individuality. Variations have been developed over UCI's history. UCIAA's brand primarily utilizes the "BC Anteater" which portrays a more comic friendly and fun style. There is a selection of Anteaters at http://studentaffairs.uci.edu/graphics_iden.php that may be used as design elements, or feelfree to have fun and create your own.

Our monogram (aka Athletics' stacked logo) is a rallying flag for athletic team support and school spirit. Its use is limited to those communications relating to our Athletics teams and departments. To obtain permission and artwork, please call 949-824-0160 or email Helen Hsueh, Assistant Athletics Director – Fan Experience at hhsueh@uci.edu.

CHAPTER LOGOS AND DESIGNS

Aligning our chapters with our master university branding is smart business. By communicating a clear relationship to the University and the Association, each chapter can leverage the equity of the UCI brand. This in turn elevates the University's status by means of a clear association to each chapter's offerings and achievements. **All chapters will receive a logo and a set of templates for event invitations and newsletters. This approved logo shall be placed on images and graphics used to promote the chapter and its events. Chapters shall not create alternative designs. Any materials that contain unapproved logos are out of the jurisdiction of the University and the Association, and thus outside the protection of our licensing agreement**. The University's trademark policy applies to all designed artwork for chapter promotional items (aka SWAG/giveaways) and merchandise. No alterations of the University marks or logos are allowed. Prior to production, artwork must be sent to the UCIAA for MarCom approval. All merchandise production is required to be done though a licensed approved vendor. UCIAA will work directly with vendors to print all merchandise. For a list of licensed vendors, visit https://www.trademarks.uci.edu/LogosAndMarks/LicensedVendors.php

Restrictions – Unacceptable Usage

This page provides some examples of incorrect usage of the UCI and UCIAA brand.

Only use colors as specified in this document.	Do not skew or distort the Signature. Only scale artwork proportionately.	Do not alter the Signature with a different typeface.
Do not enclose the Signature in a tight shape.	Do not create a Signature using more than one color.	Do not place the Signature on a background that may compromise legibility.
Do not alter the relationship of the Signature elements.	Do not outline the Signature.	Do not rotate or change the orientation of the Signature elements.
Do not place a light colored Signature on a white background.	Do not alter the configuration of the Signature.	Do not add design elements to the Signature.

WEBSITES

Chapters have a presence on the UCIAA website on a dedicated chapter's webpage that lists ways to get involved with chapters. It is important to always check this page to ensure it is updated with the most accurate information and ways to connect to your platforms. Chapter events are also promoted on the Association's event listing webpage.

SOCIAL MEDIA

Chapters should consistently maintain an active Facebook page and/or group that is active monthly at the minimum. **UCIAA will create your chapter's Facebook group and pages** in order to maintain brand consistency. Once social media handles exist, sole responsibility of its activity shall be driven by the chapter and its leadership. Your Chapter Liaison and the UCIAA marketing team must be added as additional administrators. All login information for

chapter social media outlets, such as Facebook, Twitter and Instagram, should be shared with UCIAA in the event leadership changes or crisis management is needed on social media. Chapters should only create social media accounts on platforms that can be sustained and maintained. **#UCIalumni** should be tagged in all appropriate posts. Tagging the Association's social media handles will increase awareness of posts and provide the chapter the opportunity to be reposted/shared to the larger UCIAA audience. Be sure to add @ucialumni as a collaborator when making Instagram posts/stories as MarCom monitors the account daily and can add to the account feed for greater exposure.

Facebook: http://facebook.com/uciaa

Twitter: http://twitter.com/uciaa

Instagram: http://instagram.com/ucialumni

LinkedIn Group: https://www.linkedin.com/groups/28617

LinkedIn Page: https://www.linkedin.com/company/28825369

STANDARD GRAPHIC DIMENSIONS: *Sizes subject to change as platforms are always evolving.*

UCIAA webpage header: 960 x 480 pixels
UCIAA event thumbnail: 240 x 360 pixels
Email header: 600 x 250 pixels

Facebook cover photo: 851 x 315 pixels
Facebook profile photo: 200 x 200 pixels
Facebook shared image: 1200 x 630

Facebook event header: 1920 x 1080
Instagram profile photo: 180 x 180 pixels
Instagram photo post: 1080 x 1080 pixels
Instagram story: 1080 x 1920 pixels

Twitter cover photo: 1500 x 500 pixels
Twitter profile photo: 400 x 400 pixels
Twitter in-stream photo: 440 x 220 pixels

LinkedIn shared image: 1104 x 736 pixels

MARKETING MATRIX

Chapters MarCom Matrix:					
Event Form Submitted	**Event Digest Social Media Listing**	**Emails**	**Event Digest Email**	**Reminder Email (Zoom or UCIAA)**	**Thank you Email (As needed)**
> or = 10 weeks	x	2	3+	x	x
*6 weeks	x	1	*= OR < 1	x	x
*Dependent on day/submission			matrix updated: 7/15/2022		
Subject To Change					

This matrix shows the marketing outlets that are available to chapters after the Chapter Event Form is submitted. After the Chapter Event Approval Request is submitted, the MarCom team has enough information to solidify tentative dates on our master calendar and creative direction to begin the design process.

FREE RESOURCES

Chapters are encouraged to share UCIAA content. Chapters may create their own graphics as long as they stay within the brand standards previously mentioned. There are many **free** resources online. Below are some recommended tools to make your marketing assets strong!

- Social Media Management & Scheduling Tools:
  - Hootsuite
  - Buffer - *recommended*
- Browser based graphic design tool with templates and easy to drag and drop user interface:
  - Canva
- Photos and videos for use:
  - UCIAA Flickr (www.flickr.com/uciaa)
  - UCI Flickr (www.flickr.com/ucirvine)
  - Pexels (free stock photos – may need to attribute credit to artist/photographer)
  - Pixabay (free stock photos – may need to attribute credit to artist/photographer)
  - Google images specifically "labeled for reuse" (find this under Tools → Usage rights)
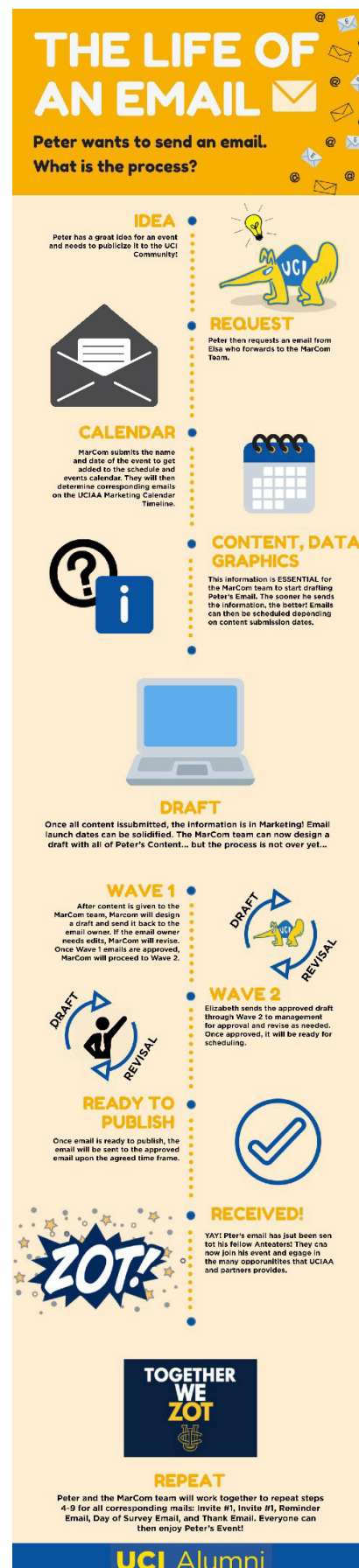
EMAIL MARKETING

The UCIAA MarCom is responsible for segmenting electronic communication to alumni and community supporters based on interest and focused demographics. UCIAA can send broadcast emails on behalf of the chapter. Chapters must provide your Chapter Liaison with a Chapter Event Form at least 10-12 weeks prior to event date for full marketing support.

They work closely with chapters to create and approve content for distribution. All design, verbiage and scheduling of broadcast emails is coordinated by the team unless otherwise discussed with the chapters. In order to accommodate multiple priorities and audiences, planning is key to successful marketing.

Providing clear direction and descriptive, complete information helps speed production. The more time given to the team, the more ability MarCom has to plan in order to provide additional support. Emails take an average 10 days to create due to extensive approval processes and design needs.

Information needed for an email event invite:

- Event date, time, location, event description, registration link, event timeline (if applicable)
- Graphics (or graphic direction), photos for marketing, required links for inclusion
- If applicable: speaker headshot and bios, social media handles of persons or organizations partnered, partner logos

THE LIFE OF AN EMAIL

Peter wants to send an email. What is the process?

IDEA
Peter has a great idea for an event and needs to publicize it to the UCI Community!

REQUEST
Peter then requests an email from Elsa who forwards to the MarCom Team.

CALENDAR
MarCom submits the name and date of the event to get added to the schedule and events calendar. They will then determine corresponding emails on the UCIAA Marketing Calendar Timeline.

CONTENT, DATA, GRAPHICS
This information is ESSENTIAL for the MarCom team to start drafting Peter's Email. The sooner he sends the information, the better! Emails can then be scheduled depending on content submission dates.

DRAFT
Once all content is submitted, the information is in Marketing! Email launch dates can be solidified. The MarCom team can now design a draft with all of Peter's Content... but the process is not over yet...

WAVE 1
After content is given to the MarCom team, Marcom will design a draft and send it back to the email owner. If the email owner needs edits, MarCom will revise. Once Wave 1 emails are approved, MarCom will proceed to Wave 2.

DRAFT / REVISAL

WAVE 2
Elizabeth sends the approved draft through Wave 2 to management for approval and revise as needed. Once approved, it will be ready for scheduling.

DRAFT / REVISAL

READY TO PUBLISH
Once email is ready to publish, the email will be sent to the approved email upon the agreed time frame.

RECEIVED!
YAY! Pter's email has just been sen tot his fellow Anteaters! They cna now join his event and egage in the many opporunitites that UCIAA and partners provides.

ZOT!

TOGETHER WE ZOT

REPEAT
Peter and the MarCom team will work together to repeat steps 4-9 for all corresponding mails: Invite #1, Invite #1, Reminder Email, Day of Survey Email, and Thank Email. Everyone can then enjoy Peter's Event!

UCI Alumni

HELPFUL WEBSITES

CHAPTER RESOURCE PAGE

For all chapter related information such as forms, how-to's, resources, and policies, please visit our new Chapters Resources Page: engage.alumni.uci.edu/s/chapter-leader-resources

SOCIAL MEDIA

Chapter Leaders Facebook Group – https://www.facebook.com/groups/505484063163768

Chapter Leaders LinkedIn Group – https://www.linkedin.com/groups/13689578/

GENERAL UCIAA

Alumni Website – engage.alumni.uci.edu

Chapters – engage.alumni.uci.edu/s/chapters

Career Support – engage.alumni.uci.edu/s/careers

Membership – engage.alumni.uci.edu/s/membership

Upcoming Events – engage.alumni.uci.edu/s/events

UCI RESOURCES

Main UCI Website – uci.edu

UCI News Site – news.uci.edu

Visit Campus (maps, tours, parking, etc.) – uci.edu/visit

University Facts – uci.edu/university-facts

UCI Strategic Plan – strategicplan.uci.edu

FINANCE

UCI Administrative Policies and Procedures: Business and Financial Affairs –

policies.uci.edu/policies/procs/701-20

Reimbursement per person expense limits – accounting.uci.edu/travel/entertainment/meal-maximum

COMMUNICATIONS

UCI Strategic Communications & Public Affairs – communications.uci.edu

UCI Brand Guidelines – communications.uci.edu/campus-resources/graphic-standards/index.php

CAMPUS PARTNERS

University Advancement – advancement.uci.edu

UCI Division of Continuing Education – ce.uci.edu

Athletics – ucirvinesports.com

Arts – arts.uci.edu

UCI Applied Innovation at The Cove – innovation.uci.edu

UCI Alumni

Chapter Funding Checklist for _____

Each chapter will be allocated a $1,000 stipend annually (Tier 1) with the understanding that all items in Tier 1 will be completed within the fiscal year end. Chapters can qualify for funding levels Tier 2 or 3 for the next fiscal year based on previous year's performance. Completed checklists must be submitted to your Chapter Liaison by May 31st (include projected events for June). Note: Newly chartered chapters will begin with Tier 1 funding.

Tier 1 - All items in this tier are to be completed yearly in order to maintain an active chapter status and receive UCIAA administrative support and $1,000 stipend.	
☐	For new board members, submit Contact Forms, Security and Use Statements (Officers & Committee), and signed Leadership Board Expectations Documents
☐	Submit Annual Event Plan by September 1st
☐	Implement quarterly leadership meetings (Chapter Liaison Invitation Required). Dates of meetings: _____, _____, _____, _____
☐	Maintain active online community by creating and publishing at least (1) post per month online and increasing followers/likes/members/connections
☐	Chapter Board participation at the Annual Chapter Leadership Summit & bi-monthly Chapter Calls
☐	Support at least (2) UCI Alumni Association engagement events throughout the year:

UCI Homecoming	☐ Giving Day	Anteaters in Service Day
Dinner with Anteaters	☐ Annual Meeting	Other: _____

☐	Host (1) signature event/program for your chapter constituents
Tier 2 - All items in this tier are to be completed in addition to Tier 1 requirements, to receive a $1500 stipend at the start of the next fiscal year.	
☐	Collaborate with another chapter or campus unit on an Alumni-Focused event: Event date: _____ Name:_____
☐	Host (1) Chapter event that focuses on one of the following: student support, school collaboration, community-building: Event date: _____ Name:_____
☐	Connect with recent UCI graduates (i.e. letter, event, mentorship) – *CC your chapter liaison on the communication*
Tier 3 - All items in this tier are to be completed in addition to Tier 1 <u>and</u> Tier 2 requirements, to receive a $2000 stipend at the start of the next fiscal year.	
☐	Establish/maintain scholarship program for students (min. $500 annual scholarship) and 3 readers
☐	Host (1) Chapter event that focuses on one of the following: career and/or professional development, networking Event date: _____ Name:_____
☐	Submit an annual report of your chapter's activities

_____   _____   _____
Printed Name   Signature   Date

Hiatus Mode – If a chapter is unable to complete Tier 1 requirements, then they must go through the following process for the following fiscal year:
1. Strategy meeting(s) with Chapter Liaison & active board members
2. Submit an annual plan after strategy meeting for review and approval
3. Once annual plan is approved, Chapter Event Approval Request should be submitted in order to receive access to stipend funds.

UCI Alumni

The Chapter Event Approval Request is a digital form and can be found here: https://forms.office.com/r/JENSYMQW14, or you can scan the following QR code with your phone:

**All events must be pre-approved by the UCI Alumni Association prior to any planning, marketing, or expense usage. Chapter events will be reviewed by the UCI Alumni Association to ensure the best alignment of resources for University initiatives and to prevent conflicts, and duplicate events.

Chapter Event Approval Request

**All events must be pre-approved by the UCI Alumni Association prior to any planning, marketing, or expense usage. Chapter events will be reviewed by the UCI Alumni Association to ensure the best alignment of resources for University initiatives and to prevent conflicts, and duplicate events.

**Events with free admission should be submitted 8 weeks prior to event date.
**Events with paid ticketing, or a donation element should be submitted 12 weeks prior to event date.

Contact Information

1. Name of UCIAA Chapter Requesting Event:

Enter your answer

2. Contact Name

Enter your answer

3. Contact Email

Enter your answer

UCI Alumni

The Chapter Leadership Application is a digital form and can be found here: https://forms.gle/89enizrJasaprfzx7 .

Chapters rely on great volunteers. A successful chapter needs a base of chapter leaders it can rely on to stay active and engaged. Active volunteers in the chapter keep the group current and energized and allow for the work to be divided amongst the leadership board. Volunteers are the lifeblood of the Association – our goals can't be met without you!

CHAPTER LEADER APPOINTMENT

Chapter leader applications will be reviewed and discussed by both the current leadership and UCI staff to come to consensus on the best candidates for each position. The UCI staff will approve the final appointments for the leadership positions. All chapter leadership board positions will be appointed in this manner. Neither elections nor self-appointments are permitted under UCIAA guidelines.

Chapter Leadership Application

We are grateful for your interest in joining the UCI Chapter Leadership Board! Learn more about our alumni chapters program here: https://engage.alumni.uci.edu/s/chapters

A variety of leadership positions may be available, including but not limited to the following:
• President
• Vice President
• Communications Chair
• Events Chair
• Treasurer
• Committee Member (multiple opportunities available)

For position descriptions, please click here:
https://docs.google.com/document/d/1JDoridRVk-rfG0mL06_EqLVxUFwGLbhhuQ2wZlNAME8/edit?usp=sharing

Each officer will have a term of two years serving the chapter.
Note: Only UCI alumni are eligible to apply.

Questions? Email: bugarini@uci.edu and wilsonmt@uci.edu

UCI Alumni

UCIAA Chapter Contact Form
Representing the

_____

1. Full name: _____

2. Preferred Email address: _____

3. Preferred Mailing address: _____

4. Preferred Phone number: _____

5. UCI degrees received information

   School: _____ Major: _____
   Degree: _____ Year: _____

   School: _____ Major: _____
   Degree: _____ Year: _____

   Additional degree (non-UCI) information:

   _____
   School

   _____
   Degree and Year

6. Employer and Job Title: _____

7. LinkedIn Profile Link: _____

UCI Alumni

Alumni Chapter Leadership Board Responsibilities

The UCI [fill in chapter's name] is a volunteer organization of the UCI Alumni Association whose purpose is to enrich the lives of alumni and engage them in a lifelong advancement of UCI.

I will uphold the organization's bylaws and agree to the following responsibilities as a leadership member of the UCI [fill in chapter's name].

9. Fulfill requirements as defined on the Chapter Funding Checklist by June 30

10. Support UCI Alumni Association engagement opportunities

11. Comply with all university policies pertaining to financial reimbursements, event planning, marketing/branding standards, etc.

12. Communicate regularly with your chapter liaison

13. Participate in chapter-related meetings and all chapter-hosted events

14. Make sound informed decisions, avoiding conflict of interest and acting in good faith and in the best interest of the organization at all times

15. Foster a sense of safety and belonging at all chapter activities

16. Be an ambassador of the UCI Alumni Association & promote the standard call-to-actions to Anteaters everywhere:
    - Get involved in a chapter
    - Be a mentor to current students or young alumni
    - Become a life or annual member of the UCI Alumni Association
    - Update your contact information
    - Make a gift to UCI

And above all, have fun and make UCI more engaging for all Anteaters!

_____   _____
Signed   Date

University Advancement

Security and Use Statement

Please sign and return to Advancement Services

As a volunteer, I understand and agree that information received from University of California, Irvine's Advancement database is confidential and the property of the Regents of the University of California. By receiving this information I agree to be bound by all applicable campus policies, system-wide policies, state and federal law which govern access to private, confidential, or proprietary information.

I understand that the University Advancement database and the data contained therein are the property of The Regents of the University of California, and are for official University Business only. No release of this information may be made to outside organizations or persons without written authorization. Immediately after using the list for the agreed-upon use, the User will destroy any and all copies of the file, including those in printed, electronic, or any other form. The user agrees not to duplicate, reuse, sell, trade or otherwise provide this information to any other party.

I am aware that the References and Related Policies on the reverse side outline University policies and State and Federal laws governing use of computer systems and disclosure of information. Violation of local, state, or federal statutes may carry the additional consequence of prosecution under the law, where judicial action may result in specified fines or imprisonment, or both, plus the costs of litigation or the payment of damages, or both.

- -

Data Requestor Name: _____

(Please Print)

Data Requestor Organization: _____

Address: _____ Phone: _____

Data Requestor Signature: _____

Date: _____

Purpose or Use of Data: _____

_____

_____

UCI Alumni Association

Newkirk Alumni Center, 450 Alumni Court, University of California

\\ad.uci.edu\uci\UA\Files\Alumni\Chapters\7 - New Chapter Tool Kit

RULES FOR CONDUCT - UNIVERSITY EMPLOYEES INVOLVED WITH INFORMATION REGARDING INDIVIDUALS:

A. Employees responsible for the collection, maintenance, use, and dissemination or information about individuals which relates to their personal life, including employment and medical history, financial transactions, marital status and dependents, shall comply with the State of California Information Practices Act. Policies under APP-720 shall be used as a basic guide in administering the Act'' provisions.

B. Employees shall not require individuals to disclose personal or confidential information about themselves which is not necessary and relevant to the purposes of the University or to the particular function for which the employee is responsible.

C. Employees shall make every reasonable effort to see that inquiries and requests by individuals for their personal or confidential records are responded to quickly, courteously, and without requiring the request to repeat the inquiry to others unnecessarily.

D. Employees shall assist individuals who seek information pertaining to themselves in making their inquiries sufficiently specific and descriptive so as to facilitate locating the records.

E. Employees shall not disclose personal or confidential information relating to individuals to unauthorized persons or entities. The intentional disclosure of such information to such persons or agencies may be cause for disciplinary action.

F. Employees shall not seek out or use personal or confidential information relating to others for their own interest or advantage. The intentional violation of this rule may be cause for disciplinary action.

G. Employees responsible for the maintenance of personal and confidential records shall take all necessary precautions to assure the proper administrative, technical, and physical safeguards are established and followed in order to protect the confidentiality of records containing personal information and to assure that such records are not disclosed to unauthorized individuals or entities.

H. Employees shall respond to inquiries and requests from individuals to review, obtain copies of, amend, correct, or dispute their personal records in a courteous and business-like manner, and in accordance with policies under APP 720.

REFERENCES

A. California Public Records Act (1976)

B. California Information Practices Act (1977)

C. California Education Code, Chapter 1.2 Division 16.5

D. California Penal Code, Section 502, Chapter 858, relating to Computer Crime

E. Federal Privacy Act of 1974

F. Federal Family Education Rights and Privacy Act of 1974

G. Electronic Communication Privacy Act of 1986

H. Health Insurance Portability and Accountability Act (HIPAA) of 1996

UCI ADMIN. POLICIES & PROCEDURES

A. APP 720-10: Information from Public Records (California Public Records Act) – Guidelines

B. APP 720-11: Privacy of and Access to Information (Excluding Student Records) – Guidelines

C. APP 720-12: Student and Student Applicant Records - Guidelines

UC BUSINESS AND FINANCE BULLETIN

Records Management Program Series:

A. RMP-7: Privacy of and Access to Information Responsibilities

B. RMP-8: Legal Requirements on Privacy of and Access to Information

C. RMP-9: Guidelines for Access to University Personnel Records by Governmental Agencies

D. RMP-12: Guidelines for Assuring Privacy of Personal Information in Mailing Lists and Telephone Directories

Information Systems Series:

A. IS-3: Electronic Information Security

UC POLICIES APPLYING TO CAMPUS ACTIVITIES, ORGANIZATIONS, AND STUDENTS

A. Section 130: Policies Applying to the Disclosure of Information from Student Records

B. UCI Campus Implementation, August 1996

    a. Section 130: Policies Applying to the Disclosure of Information from Student Records

of the UCI Alumni Association
Bylaws

ARTICLE I: ORGANIZATION NAME

This organization shall be known as the _____(insert name)_____ Chapter of the UCI Alumni Association (UCIAA). This organization may also be referred to as ___(insert nickname)___.

ARTICLE II: MISSION STATEMENT - PURPOSE

The _____(insert name)_____ Chapter is committed to fulfilling the following mission:

To enrich the lives of alumni and engage them in a lifelong advancement of UC Irvine.

ARTICLE III: MEMBERSHIP

A.   Participation in the _____*insert name*_____ Chapter is open to any UCI alumni interested in alumni activities at UCI.

ARTICLE IV: Chapter Leaders

A.   As a member of the chapter leadership board, you are expected to represent the chapter professionally and ethically in all organizational activities.

B.   The leadership board shall have no less than five (5) members. The required leader positions are as follows:
   1. President
   2. Vice President/President Elect
   3. Treasurer
   4. Communications Chair
   5. Event Chair

C.   It shall be the duty of the leaders to be fiscally responsible for the organization and to provide sound leadership for the _____(insert name)_____ Chapter in order to carry out the mission statement. To this end, the leadership board shall develop an annual plan and set goals for the ___*insert name*_____ Chapter.

D.   Terms of Office:
   1. Each leader will have a term of two years, and may not serve more than two consecutive terms in office in the same position without a one-year break in service.
   2. If a leader cannot fulfill his or her duties, the President may appoint a member in good standing as an interim leader until the next election. The interim term shall not count towards the chapter leader's term limit.

E.   The leadership board shall have the authority to establish committees and appoint a chairperson for each committee. The chairs of these committees, if not already chapter leaders, shall be considered as part of the leadership board.

F.   Duties of Leaders

President

1. Provide overall leadership and direction to the alumni chapter.
2. Execute an annual plan and set goals in conjunction with your leadership board to support the mission of the Association. Submit by September 1st.
3. Supervise the coordination of the chapter's activities.
4. Attend chapter events and activities.
5. Preside over chapter meetings.
6. Exercise overall financial responsibility for the chapter and uphold university policies.
7. Encourage your full chapter board to attend the annual Chapter Leadership Summit.
8. Serves as primary contact for the Chapter Liaison.
9. With the help of the Vice President and Chapter Liaison create a succession plan for new chapter leadership.
10. Ensure board members are complying with deadlines of event and financial forms.
11. Encourage your full chapter board to attend the bi-monthly All Chapter Leaders Conference Call.

Vice President

1. Preside over meetings in the absence of the President.
2. Coordinate with the chapter president to advise all chapter leaders in the completion of tasks and responsibilities.
3. Serve as interim President, if necessary, during a presidential transition.
4. Record chapter meeting minutes, including approved expenditures that are within the University policies and distribute to leadership board and Chapter Liaison in a timely manner.
5. Maintain current roster of chapter leaders and submit updates to Chapter Liaison.
6. With the President, oversee the succession planning process.

Treasurer

1. Develop an annual budget and keep track of all financial revenue and expenses of the chapter.
2. Immediately work with payee on submitting chapter reimbursement within one week of an event. Keep copies of all invoices, receipts, etc. on file for at least two years.
3. Work with Event Chair to keep track of and manage event budget.
4. If applicable, work with Scholarship Chair to track scholarship donations.
5. Obtain board minutes stating the approval of the expense.

6. Keep the rest of the leadership board informed on the chapter's financial status.
7. Routinely reconcile Treasurer's report with UCIAA report.

Communications Chair
1. Strategize and implement social media and marketing campaigns for the chapter.
2. Ensure chapter marketing content is in compliance with the University of California communication policies. Policy 800-16, Part b14 (https://www.policies.uci.edu/policies/pols/800-16.php#partb14) and that the chapter adheres to the Association's branding guidelines. (Page 42)
3. If applicable, check chapter email inbox; respond and delegate responses as needed.
4. Oversee chapter social media platforms and maintain an active online presence to meet requirements on the Chapter Funding Checklist. (Page 55)
5. Provide social media login information to your Chapter Liaison. Assign your Chapter Liaison as an admin or moderator on all social media accounts to assist in continuity of content during leadership transition.
6. Encourage fellow chapter leaders to promote events to their direct networks and personal social media platforms.
7. Share UCIAA messaging on chapter social media platforms.
8. Ensure all social media platforms and websites (if applicable) are up to date with latest information (upcoming events, board directory, contact info, etc).

Events Chair
1. Work with chapter leadership board to design programs which appeal to the alumni group's diverse constituency and to plan the year's calendar of events. (See Annual Event Planner, page)
2. Inform Chapter Liaison of plans and activities by submitting a *Chapter Event Approval Request* for coordination through the UCIAA office. (See page)
3. Coordinate with Communications Chair to ensure proper lead time for communications promoting events and programs to alumni.
4. Oversee the planning of events including all logistics, in accordance with checklists and other tools provided (See Event Planning Section, page 29)
5. Ensure that all events incorporate the mission and goals of the chapter and Association.
6. Complete post event tasks and reports by submitting sign in sheets, event photos, thank you email call to action items and event reimbursements to Chapter Liaison.

ARTICLE VI: LEADER ASSIGNMENTS

Chapter leadership board will recruit and propose a board slate. UCIAA will confirm the appointment of new chapter leaders.

ARTICLE VII: MEETINGS

A.   Meetings of the leadership board shall be held at least quarterly.

B.   Quarterly meeting minutes must be submitted to chapter liaison in a timely manner (2

weeks).

ARTICLE VIII: PARLIAMENTARY PROCEDURE

A.   The standing rules and regulations of the leadership board and leadership meetings shall be based on **Robert's Rules of Order**.

B.   In addition, the _____*insert name*____ Chapter will comply with the bylaws of the UCIAA, as well any decisions of the UCIAA Board of Directors. The UCIAA bylaws will serve as primary reference for resolution if questions, omissions, or conflicts arise within chapter bylaws.

ARTICLE IX: FINANCES

A.   Budget allocations must be approved by a vote of two-thirds of the leadership board.

B.   Chapter reimbursements and financial affairs must comply with university policies and deadlines.

C.   The UCIAA shall be authorized to receive any information, records, or photocopies of transactions relating to the accounts as UCIAA may at any time request other records and documents of the organization.

D.   If this organization should ever dissolve, any remaining assets held in its name shall be allocated by UCIAA.

ARTICLE X: CHARTER REVOCATION

A charter may be revoked by majority vote of the Board of Directors upon the occurrence of any of the following:

1. Failure to comply with the requirements and policies set forth within these bylaws
2. Taking any action detrimental to the university or the association.
3. Any unauthorized or improper use of the association's name, brand, digital content, stationery, mailing lists, tax identification, or the like.

END

Revised August 2023

UCI Alumni

The Chapter Reimbursement Form is a digital form and can be found here:
https://forms.gle/2wgQbypLRtRfAqQFA

As a reminder, reimbursements need to be submitted within 1 week of the event date.
Make sure to have the following:

- Proof of event: Agenda, Email Invite, Event Graphic, Social Media
- Proof of payment: Itemized PAID receipt (with last (4) digits) or zero balance invoice
- Attendee List
- Recipient List (only applicable for gift or prize reimbursements)

UCIAA Chapter Reimbursement Form

Reimbursement requests must be submitted within 1 week of the event date

wilsonmt@uci.edu Switch account

The name and photo associated with your Google account will be recorded when you upload files and submit this form. Your email is not part of your response.

Reimbursement Details

Along with completion of this form, the following documentation must be submitted within this form:

- Proof of Event/Meeting: Email Invite, Event Flier, Event Post, Meeting Agenda
- Proof of Payment: Itemized PAID receipt from place of business (with last 4 digits of card) / A duplicate of the check written to pay the business / A screenshot of credit card charge from bank statement ***NOTE: All personal information must be redacted (i.e. mailing address, email address, etc)
- Attendee List
- Recipient List (only applicable for gift or prize reimbursements)

Next   Clear form