

UNIVERSITY OF OREGON ALUMNI ASSOCIATION

HANDBOOK FOR ALUMNI
CHAPTERS AND NETWORKS



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LETTER FROM THE EXECUTIVE DIRECTOR

Dear chapter and network volunteers,

On behalf of the students, faculty, and staff of the University of Oregon, thank you for your commitment to and support of your alma mater. We appreciate your interest in helping build a strong, vibrant alumni community.

The UOAA strives to support our alumni who create and sustain strong Duck communities around the world. As volunteer leaders, you play a vital role in shaping the goals and activities of your chapter, and in serving as the face for UO alumni, parents, and friends in your area. This handbook is designed to offer ideas, guidance, and support as you work toward building a community of Ducks.

Raphe Beck

Executive Director, UO Alumni Association

MISSION, MEMBERSHIP, AND NON-PROFIT STATUS

UOAA MISSION

The University of Oregon Alumni Association fosters lifelong relationships, deepens engagement, and advocates on behalf of the university and Duck alumni around the world.

We hold ourselves to a standard of conduct that represents the UOAA and the University with the highest integrity. [Our values are community, heritage, impact, and fun.](#)

UOAA MEMBERSHIP

The support of alumni association members allows the UOAA to create alumni connections through online and in-person events, publications, and career programming, as well as funding student scholarships and internship programs. Most importantly, membership shows pride in the UO and our Duck alumni community.

In return for their dedicated support, UOAA members receive exclusive access to events and discounts. We encourage all chapter board members to join the University of Oregon Alumni Association as Annual members or for Life!

UOAA NON-PROFIT STATUS

The University of Oregon Alumni Association is a 501(c)(3) charitable organization, and all recognized chapters operate under the UOAA's non-profit tax ID.

TYPES OF ALUMNI GROUPS

REGIONAL CHAPTERS

Regional chapters provide local alumni opportunities to connect through engaging and educational programming, social activities, football and basketball watch parties, and networking opportunities that build professional connections within the Duck community. The UOAA has twenty-five active chapters across the country, including fourteen chapters that award either academic or intern scholarships to current students each year.

CULTURAL, IDENTITY, AND AFFINITY NETWORKS

Cultural, identity, and affinity networks offer the opportunity for alumni with unique perspectives to come together. The networks have social events, support student groups, raise scholarship funds to recruit students, promote civic and philanthropic involvement, and engage in programming to continue a commitment to lifelong learning and the celebration of what brings them together in community. Current affinity networks are the Black Alumni Network, Native Duck Nation, Patos Alumni Network, Asian Desi Pacific Islander Network, Jewish Alumni Network, Oregon Alumni Band, Veteran Alumni Network, Friends of Oregon Rowing, and UO Pride Alumni.

PROFESSIONAL NETWORKS

The UOAA helps alumni from specific schools and colleges stay in contact with their classmates through professional alumni networks. Professional networks host networking events, class reunions, and other gatherings in partnership with their school or college. Professional networks recognized by the UO Alumni Association include the Law School Alumni Association, Oregon Executive MBA Network, and Sports Product Management Network.

INTERNATIONAL CHAPTERS

The University of Oregon Division of Global Engagement and the Alumni Association work in partnership to keep overseas alumni in touch with campus through targeted communications as well as alumni chapters in Indonesia, Japan, South Korea, and Saudi Arabia.

TYPES OF EVENTS

WATCH PARTIES

Watch parties are where alumni, fans, and friends come together to cheer on the University of Oregon's athletic teams. Watch parties are held at local venues and are used for fundraising, member recruitment, and volunteer recruitment.

NETWORKING EVENTS

Networking events provide an opportunity for alumni to meet and connect professionally with each other. These events are open to everyone, but typically have discounted pricing options for recent graduates and UOAA members. Additionally, the Duck Career Network organizes online events where alumni can connect with each other as well as current UO students, and these events can also be promoted to alumni in your chapter or network.

SIGNATURE EVENTS AND REUNIONS

Signature events are unique to each chapter or network, but each should have a theme specific to the chapter or network and should happen around the same time each year. An example is a fundraising event that raises money for chapter scholarships that happens each May. Another example is a block of tickets to see a baseball game with a pre-game reception that happens each summer.

COMMUNITY BUILDING EVENTS

Community building events include social events like happy hour meet ups, outdoor activities, culture, music and art focused events, and other social gatherings.

CONTINUING EDUCATION EVENTS

Continuing education events are ones in which alumni groups provide opportunities for learning and personal and professional development. An example would be a webinar or in-person gathering where facilitators present on a subject.

VOLUNTEERING EVENTS

Volunteering events can include volunteering at a local food bank, providing after-school tutoring, or any other event that would benefit your community. These events are an effective way to provide meaningful and diverse programming to alumni in your area who may not engage with the UO through athletics-focused events.

RECENT GRADUATE EVENTS

Events from this category are created with alumni who graduated in the last five years in mind. They often focus on welcoming new graduates to the alumni community, career networking, and socializing. In addition to events targeted specifically at young alumni, components that would appeal to them— discounted pricing, targeted marketing, etc.—can be built into other events.

UO ALUMNI ASSOCIATION ANNUAL CALENDAR

January

UO Alumni Association begins budgeting for the next fiscal year

February

UO Alumni Association Winter Board Meeting is held in January or February

April

UOAA begins promoting chapter intern scholarships

Grad Fair – UOAA New Grad membership drive campaign begins

May

UO Alumni Association Spring Board Meeting is held in April or May

New Grad Gift Pickup

Ducks Give – UO's annual day of giving, with campaigns benefiting chapter scholarships

June

Regional chapters determine the number of academic scholarships to award for the upcoming school year

Commencement events and activities

End of fiscal year

July

Beginning of fiscal year

Promotion of Mighty Oregon Tailgates begins

August

Chapter football watch party events added to UO Alumni website

September

UO Alumni Association Fall Board Meeting is held in September or October

UO students are awarded academic scholarships from regional chapters

UO academic year begins

Mighty Oregon Tailgates begin, hosted at select away games

October

UO Alumni Association Reunion

November

Rivalry Week membership drive competition with Oregon State University

December

Pac-12 and Bowl Game tailgates UO

ALUMNI ASSOCIATION VOLUNTEER CONDUCT STATEMENT

The values of the University of Oregon Alumni Association state that we hold ourselves to a standard of conduct that represents the UOAA and the University with the highest integrity. We do so while pursuing the UOAA's mission to foster lifelong relationships, deepen engagement, and advocate on behalf of the university and Duck alumni around the world.

We are grateful for the time you devote to supporting the UO and UOAA and your commitment to creating this community. By volunteering, you agree to:

- Maintain respectful and considerate behavior when interacting with other volunteers, alumni, parents, students, campus staff, and other university constituents.
- Foster a collaborative and supportive environment among all volunteers.
- Identify yourself as a UO/UOAA volunteer rather than an employee or official representative of the UO/UOAA when engaging with third parties, including media outlets, universities, companies, and others.
- Know, adhere to, and abide by institutional policies and procedures, especially those associated with fiduciary obligations provided during orientation and trainings.
- Act in the best interest of the university. This includes being good stewards of financial support from the UOAA and its members to pursue programmatic goals.
- Secure all sensitive and confidential university information.
- Avoid actual, potential, or perceived conflicts of interest, including abuses of power.

We ask that volunteers acknowledge and adhere to these expectations. Volunteers should also know they are supported and can expect other members of our community to uphold this code of conduct. If you have concerns about any member of our community or have questions about any UO or UOAA policies, please contact your UOAA staff manager or UOAA Executive Director Raphe Beck at rapheb@uoregon.edu or 541-729-2977. The UO and UOAA reserve the right to disengage with any volunteer at any time.

RESOURCES FOR CHAPTERS AND NETWORKS

EVENT SUPPORT

The UOAA provides a variety of services and support to alumni groups to ensure their success, including on and off-campus venue reservations, and assistance with the organizing, planning, and implementing of events with prior approval. The UOAA can also provide access to the use of various digital platforms for hosting online events, including virtual happy hours, networking events, game nights, webinars, and silent auctions. As part of the planning process for each event, your UOAA staff member will work with your group and the alumni communications team to develop a promotional strategy, provide a timeline, and help to make your event a success.

FINANCIAL SUPPORT

Each year all UOAA groups are given at minimum \$500 in annual support (apart from regional chapters that only host watch parties who receive \$250 annually). In addition to the annual funds provided each year, chapters and networks may request additional funds to help cover the expense of events, including but not limited to, costs associated with speakers, marketing and promotion,

catering, and raffle or silent auction items. Only the chapter or network president, or a board member appointed by the chapter president, can submit a request for additional funds.

SCHOLARSHIP SUPPORT

UOAA groups that raise money to support their chapter academic or internship scholarship are eligible to receive matching funds from the UOAA. The UOAA will match all new donations made by the chapter or individual donors to a University of Oregon Foundation UOAA scholarship account or endowment each fiscal year, up to \$3,000. This does not include annual distributions from endowment accounts.

Chapters can request a report that details their scholarship fund balance for a board meeting with two weeks' notice.

Groups interested in starting a new scholarship fund should connect with their UOAA staff member prior to any fundraising activity to discuss the feasibility of the scholarship. The UOAA will match up to \$5,000 for an initial deposit when a new University of Oregon Foundation scholarship account is set up. In some cases, the UOAA may recommend against creating a scholarship fund, typically based on average annual enrollment from the region; in the instance of recommending against creating a new fund, your staff member can assist the chapter in finding an already existing program or fund on campus to support to meet their goals.

Academic Scholarships: All regional chapter academic scholarships are awarded through the General University Scholarship program administered by the UO Office of Student Financial Aid and Scholarships. OSFAS typically sets the scholarship levels at \$1,500 for incoming first-year students, regardless of residency, and \$3,600 for returning students, regardless of residency. These numbers are subject to change each year in accordance with the OSFAS guidelines and policies.

Internship Scholarships: Internship scholarships are awarded through a process set up in collaboration with the UO Career Center and paid through the OSFAS. Amounts and deadlines for internship scholarship awards are set by the chapter in consultation with your UOAA staff member.

CHAPTER NEWSLETTER

The chapter newsletter is a monthly newsletter exclusively for UO Alumni Association chapter and network board members. The newsletter includes updates relevant to all volunteers, group events, featured board members, and upcoming training opportunities. All chapter and network board members are encouraged to read the monthly newsletter.

ADDITIONAL RESOURCES

You can find additional resources on the UOAA website and in your group's Google Drive:

- UO Style Guide
- Chapter Logos
- Sample Bylaws

EXPECTATIONS FOR CHAPTERS AND NETWORKS

RECRUITMENT AND ONBOARDING

All board members are expected to be able to talk about the chapter and benefits of joining the board with anyone they meet at events or out in the community. Additionally, chapter presidents are expected to email, call, or meet with potential volunteers UOAA staff connect them with.

Chapter presidents should communicate with UOAA staff anytime there is a volunteer departure, or a new volunteer added to the board. Chapter presidents are also responsible for sharing this handbook and any other resources provided by the UOAA with all incoming board members.

BOARD MEMBER DUTIES

All chapter board members should bring energy and ideas for how to make their chapter more successful. They should also be prepared to attend most chapter events and board meetings and participate in the planning and execution of chapter events. Chapters should ensure the role of president and treasurer are filled before creating other board positions.

BOARD MEETINGS

Chapters are responsible for scheduling, drafting agendas, and running their own board meetings. Volunteers are welcome to reach out to UOAA staff for information needed for board meetings and should do so at least two weeks in advance. All chapters should share board meeting agendas or a brief meeting recap with your UOAA staff member. If a staff member has set up a virtual board meeting in Zoom on behalf of your chapter, please keep them updated with any time changes or cancellations.

EVENTS

Volunteers are responsible for coming up with the idea for each event, planning, and submitting all event details through the [UOAA Event Request Form](#)—including financial details—to the UOAA no less than 50 days before an event. Volunteers are also expected to do personal recruitment and outreach, post on social media, submit attendee information to the UOAA, and staff their own events, including ensuring there is a check-in station for event guests and a plan to collect onsite registration and donations. Volunteers should also engage with attendees, promote the chapter, and promote the UOAA. There is a comprehensive event planning guide at the end of this handbook that volunteers are encouraged to use while planning their events. Note: the UOAA reserves the right to cancel events that do not follow our policies.

CAMPUS PARTNERSHIPS

Chapters are welcome to partner with other UO entities, and volunteers are encouraged to reach out to UO organizations, departments, and faculty/staff with whom they have prior relationships. Volunteers should copy their UOAA staff member on correspondence to keep the UOAA apprised of outreach to campus partners. In some cases, the UOAA staff member may request that a volunteer not connect with a campus partner or individual to ensure that campus partners are not being inundated with too many requests or if another person in the department has already been identified as the UOAA's main contact. If the chapter plans to co-host an event with a UO campus partner, sponsor a campus partner's event, or have a campus partner sponsor their event, an agreement is required and will need to be submitted to the UOAA staff member for vetting and

signed by the UOAA Executive Director.

ALCOHOL

Any event where alcohol will be sold, served, or auctioned is required to operate within state and local laws and university policies. Local laws and university policies require that no one under the legal drinking age may be sold, served, or allowed to consume alcohol. Proper protocols must be implemented to provide age verification.

The following guidelines apply for all UOAA events where alcohol is present:

All event activities are expected to be planned and conducted in compliance with UO policy and state and local laws.

Alcohol must be served by a licensed and insured vendor.

Events providing alcohol must include food and non-alcoholic beverages for the duration of the event. If the alcohol is free, then the food and non-alcoholic beverages must also be free. If the alcohol is being sold, then food and non-alcoholic beverages may also be sold at reasonable prices.

Event participants cannot provide their own alcohol.

No more than two (2) drinks may be given to any one person at a single time.

Alcohol, including bottles of beer and wine, cannot be auctioned off during an event. Chapters can instead use gift cards to wineries, breweries, etc. or vouchers that can be exchanged for a specific product at a winery, brewery, or store.

In addition to the guidelines above, other restrictions apply for UOAA events that will be marketed to student attendees or other minors where alcohol will be served. Please work with your staff member if your event falls under this category.

GAMBLING

As a public charity, the UOAA is only granted one gambling license per calendar year. This includes casino nights, Monte Carlo nights, bingo nights, and other gaming-related activities. Because of the large number of groups under the UOAA's nonprofit tax ID, the UOAA will not secure gambling licenses or approve gaming activities on behalf of chapters.

CONTRACTS

Most venues for events and activities require a signed contract to move forward. Chapters should coordinate contract approval with their UOAA staff member. Because all chapters operate under the UOAA's nonprofit tax ID, all contracts must be vetted by the UOAA and signed by UOAA leadership in Eugene to protect the chapter against disagreements with third party entities. If a chapter program or event does not have an official contract with a venue or caterer, chapters should coordinate with their UOAA staff member to identify any risk or liability issues.

EVENT SPONSORSHIPS

Event sponsorships are income from an individual, business, or other entity that are directly tied to an event being hosted by a UOAA group used to offset event expenses. All event sponsorships require a sponsorship agreement that outlines event information, amount of the sponsorship, and what the sponsor will receive in exchange (event tickets, logo on marketing,

etc.) as well as a W9 for the sponsor. Sponsor benefits should have a value assigned to them. Event sponsorships are tax deductible up to the value of the sponsorship less the fair market value of sponsor benefits. All event sponsorship income in excess of the cost of the event will be deposited into the chapter or group's bank account to be used for operating expenses. Chapters and networks should coordinate with their UOAA staff member if they plan to solicit sponsorships for an upcoming event to consult on the best process for collecting required information.

GIFTS TO CHAPTERS AND NETWORKS

Gifts are income from an individual, business, or other entity that are given to the chapter or group for unrestricted use. Gifts can be made online (up to a value of \$750) or via check. Checks for gifts should be made out to the chapter or group. If mailed or given to a chapter or group volunteer, the bank account signer for the chapter or group can deposit the check and send required information (donor name, address, amount) to their UOAA staff liaison to submit for a gift receipt. If mailed to the UOAA, UOAA will deposit the check into the proper bank account and send a gift receipt. Talk with your staff member if a company asks for an invoice to make a gift.

GRANTS

Because all groups operate under the UOAA's nonprofit tax ID, all grant applications must be vetted through the UOAA. If a group is interested in applying for a grant or grant renewal, they must reach out to their UOAA staff member for UOAA approval. Please include a link to the Request for Proposals, submission deadline, grant requirements, how much is being requested, and how the group plans to use the grant dollars. After UOAA approval, the group should submit the application and forward all decision information (approvals, communications, etc.) to their UOAA staff member.

AUCTIONS

All auctions must be managed through the UOAA's online auction platform, SchoolAuction.net. Your UOAA staff member will set up the auction and the chapter will provide all required information, including fair market value of each item. SchoolAuction.net provides an easy checkout feature and allows donors to receive receipts for their silent auction purchases. Chapters collecting donations for silent auctions should work with their UOAA staff member to ensure that they are collecting the necessary information from donors to issue tax receipts.

FINANCIAL COMPLIANCE

Chapters are to exercise professional judgment, in addition to complying with applicable policies and procedures, when incurring expenses on behalf of the UOAA chapter. Any deviation could result in a complete financial review. Chapters are required to operate within IRS guidelines to ensure 501(c)(3) nonprofit status is protected. The chapter president must work with the UOAA to discuss and gain pre-approval for any deviation from any policy, guideline, or procedure.

Chapter presidents and treasurers are expected to approve bank account activity logs, provide information regarding the business purpose of each transaction, and upload digital copies or photos of receipts, deposit slips, or Square Reader reports for each transaction in their designated Google Drive, using the chapter's login credentials, <chaptername>@uoalumni.com. This practice ensures UOAA chapters are operating in compliance with IRS protocols and allows for the UO Advancement Financial Services team to provide accurate reporting for financial statements, taxes, and audits.

The UOAA operates on a July 1 to June 30 fiscal year. Folders in each chapter Google Drive are

organized by fiscal year. Bank statements will be uploaded to the shared folder monthly by the Financial Services team. Signers on the bank accounts should be able to download e-statements by logging into their OCCU online bank portal.

CREDIT CARD READERS

Chapters that manage events and receive funds via credit cards in direct connection with the performance of their chapter are required to use a PCI compliant device and terminal. Mobile credit card readers called Square Readers will be provided by the UOAA, and this equipment will stay with the designated board member for the duration of their term.

To set up a Square Reader, send the serial number on the Square Reader device to your UOAA staff member. To use your Square Reader for an event, chapters can request a code from your UOAA staff member. The code will be sent directly to the requesting volunteer's email address and each device will have a unique code for logging in. When a code is initially assigned, the chapter has 24 hours to input the code into the device. Please set up an itemized inventory for your event for an easy event closeout and reporting process. Full Square Reader instructions can be found in your group's Google Drive.

EMAIL

The UOAA utilizes the same email database as the entire University of Oregon. To honor alumni unsubscribe preferences, and to ensure they are not receiving too many emails, groups may not use their own databases and email systems to communicate with alumni in their respective regions.

SOCIAL MEDIA

All groups must have at least one active social media account that keeps alumni in their community informed of all events. Any volunteer creating graphics or posting on social media should review the UO Style Guide. Graphics containing UO or UOAA branding must be reviewed by the alumni communications team. Additionally, each group should follow the UOAA's social media pages (@uoalumni on Facebook, Twitter, LinkedIn, and Instagram). Each group should share the passwords for its social media account(s) with the UOAA or ensure that your UOAA staff member has administrative access.

WEBSITE

The UOAA will work with each chapter to maintain a webpage that lists chapter leaders, social media links, and upcoming local events. This webpage is the official website for your chapter, and the UOAA does not allow any alternative websites or webpages. All board members should have an account on the UOAA website, ensure that their contact information and address are up-to-date, and remain subscribed to receive emails from the UOAA.

BRANDED ITEMS

All groups must consult with the UOAA prior to printing any t-shirts or items with the UO or UOAA logo and order from the UO's list of approved vendors. Please follow these steps to find a vendor, get artwork approved, and sell swag or resale licensed products for fundraisers.

Find a Vendor

- Find a [UO approved vendor](#) that has the item that you are interested in.
- If you have a vendor that you want to use that is not on the list, the non-approved vendor needs to fill out a UO W9 and submit the W9 to your UOAA staff member. Your staff member will submit the W9 to UOAA Communications for review and approvals.
- Upon approval, UOAA Communications sends the W9 and a contract request to the UO Advancement Finance Department. The contract approval process can take a minimum of four weeks to be processed by Finance. Be sure to work this into your overall timeline.

Note: If you are ordering apparel under 1,000 units, the manufacturer's logo or branding cannot appear on the exterior of the garment. Inside the neck label is acceptable. If you have an order above 1,000 units, UO Brand Management and Trademark Licensing will assist with orders.

Get Artwork Approved

- If you are only using your UOAA chapter logo in your designs, you can submit the ESP version of the logo to the approved vendor. Those who create artwork need to be aware of [Clear Space and Minimum Size Requirements](#) when using logos.
- Once you have a graphic designer who has created a unique design for your chapter, be sure they have reviewed the [UO Brand Guidelines](#) before they start work on your artwork.
- Once the proof has been signed off by your chapter president and UOAA staff member, the artwork is approved and can be submitted to the vendor.
- Your artwork will need additional approvals in the following circumstances:
 - Use of the UOAA logo will require approval from UOAA Communications.
 - If you are using [Mascot or Webfoot Marks](#), artwork will need to be submitted to UOAA Communications who will review and approve before getting final approval from UO Brand Management and Trademark Licensing.
 - All products that carry UO logos and marks must be produced by officially licensed vendors through the [UO's licensing agency, Fanatics Licensing Management](#).
- Artwork Restrictions
 - [Athletics Marks](#) and Logos and the [Great Seal](#) are restricted and will not be approved for chapter/network use.
 - The UO, UOAA, and Chapter/Network name and marks may not be associated in any way with:
 - Tobacco, controlled substances, sexually oriented products, alcohol, religious products, or games of chance.
 - Sexually suggestive text or graphics, denigrating language toward any group, items that infringe on other trademark owners, or endorsement of political candidates.
 - Products that do not meet minimum standards of quality and/or taste, are judged to be dangerous, or carry high product liability risks.

Selling Branded Items at a Fundraiser

Requests to purchase licensed products for resale must be approved in advance by Brand Management and Trademark Licensing. These products are royalty bearing and must be sourced through an approved internal product licensee. If you have a licensed product that you are interested in selling as part of a fundraiser, send a link of the item to your UOAA staff member and UOAA Communications.

RESOURCE APPENDIX

SUGGESTED BOARD POSITIONS

President

Term: 1-2 year(s)

Key responsibilities:

- Provide leadership and direction to alumni chapter board
- Lead board in developing annual plan and establishing goals for the year
- Maintain regular contact with UOAA office
- Schedule and preside over chapter board meetings
- Ensure all UOAA guidelines are followed
- Develop effective recruitment and retention strategies for board members
- Develop mechanisms to recognize volunteers for their service

Past President

Term: 1 year

Key Responsibilities:

- Oversee the transition of leadership of alumni chapter board
- Support alumni chapter events and programs throughout the year

Vice President

Term: 1-2 year(s)

Key responsibilities:

- Work with president to develop communication, outreach, and event strategies
- Support alumni chapter events and programs throughout the year

Treasurer

Term: 1-2 year(s)

Key responsibilities:

- Manage the chapter's bank account
- Submit all expense and income receipts and documentation to the UOAA
- Ensure timely payment of all bills incurred by the group

Secretary

Term: 1-2 year(s)

Key responsibilities:

- Record significant milestones for the group's history
- Record and distribute board meeting notes to the UOAA and fellow board members

Events Chair

Term: 1-2 year(s)

Key responsibilities:

- Develop a plan for events in coordination with the chapter president
- Fill out the event request form and plan events in partnership with the UOAA
- Track attendance at events and submit attendee data to the UOAA

Communications Chair or Social Media Chair

Term: 1-2 year(s)

Key responsibilities:

- Post events, chapter, UOAA, and UO updates, and other relevant content on social media in a manner consistent with UOAA branding
- Ensure photographs are taken at every chapter event
- Participate in occasional social media takeovers on the main UOAA social media accounts

Watch Party Chair

Term: 1-2 year(s)

Key responsibilities:

- Develop a plan for the watch party season in coordination with the chapter president
- Lead watch party activities at each game
- Track attendance at each watch party and submit attendee data to the UOAA

Philanthropy (Development) Chair

Term: 1-2 year(s)

Key responsibilities:

- Create a fundraising plan to meet the financial goals of the group in coordination with the chapter president and UOAA
- Provide leadership and direction to alumni chapter board around fundraising initiatives
- Identify external sources of support, i.e., sponsors, grants, employer match programs, donors
- Thank and acknowledge donor and sponsor gifts

EVENT PLANNING GUIDE

EVENT DETAILS

Please finalize as many event details as possible before submitting the [UOAA Event Request Form](#). This guide is designed to help you consider all the information needed before submitting the UOAA Event Request Form. Basic event details (event name, date/time, need for registration, etc.) should not be changed after submittal unless absolutely necessary. Secondary event details (run-of-show, etc.) can be changed as event planning moves forward.

Questions:

- What is the name of your event?
 - Items for consideration:
 - Keep the event title short (2-4 words) since this will be included in all event marketing.
 - If this is an annual event, keep the name consistent each year to create name recognition.
 - Connect with your staff member to see if your Duck pun is one that is already regularly being used by another group and may cause confusion.
- What is the date and time of your event?
 - Items for consideration:
 - Other events being hosted by UO in the geographic area, or that may conflict with your event.
 - Large community events in the region that may conflict with your event.
 - Availability of your volunteers to support and attend the event.
 - Availability of your staff member to be at the event if desired.
 - Are there dates that UOAA or UO staff will be in the area that would add to the event?
 - Who is your target audience for the event (e.g. recent grads, current chapter members, region newcomers). Consider when they would be most likely to attend your event.
 - Previous event success at certain days and times.
- Are you partnering with any other groups for this event?
 - Provide the name and email address for any partner contacts on the UOAA Event Form. UOAA staff will submit requests for any required partnership agreements.
 - Items for consideration:
 - Does it make sense to partner with another UOAA group or program for the event?
 - Ex. Partnering with the Duck Career Network for a professional panel or career networking event or partnering with a regional chapter for an event in that region.
 - No written agreement is needed for partnerships between UOAA groups or programs. It is a good idea to ensure each group agrees on what they will provide or will receive at the beginning of the partnership.
 - Does it make sense to partner with another UO group or program for the event?

- Ex. A professional group partnering with their corresponding program to host an event.
 - An agreement is needed for partnerships between UOAA and UO groups/programs. We do not need to collect a W9 for partnerships with UO groups, but what each partner agrees to provide or will receive should be clearly outlined.
- Does it make sense to partner with an outside group?
 - Ex. A group partnering with a local credit union or bank for a financial wellness and literacy event.
 - An agreement is required for partnerships between UOAA and outside organizations (both for-profit and nonprofit).
 - We need to collect a W9 for the partner organization.
 - What each partner agrees to provide or will receive should be clearly outlined. Ex. Financial support in exchange for outside partners logo in all marketing materials.
- Who is your event lead?
 - Each event should be assigned an event lead from the group or volunteers. This person will make final decisions for the event and be the main point of contact for your UOAA staff member.
 - Your group can assign a different event lead for each event or have an Event Chair who acts in this role for all events.
 - For cultural & identity, affinity, and professional groups, you are encouraged to have an event lead or secondary event contact who lives in the geographic area of any in-person events and can attend the event.
- What do you envision your event including and what makes it special?
 - This information will be used for any event descriptions and copy for webpages and emails. UOAA staff members will work with UOAA Communications to edit content and send it to the event lead for review.
 - Volunteers are encouraged to write draft copy describing your event, since you know it best, but you can request assistance from UOAA.
 - UOAA has an event copy template that your UOAA staff member can provide as a guide.
 - Items for consideration:
 - Do you plan to have any speakers? Highlight them with a speaker bio. Make sure you have their bio and headshot for all marketing materials within the 50-day timeline.
 - Does your venue have any unique features?
 - Are you hosting a drawing or any activities for attendees to receive prizes or giveaways?
- What is your attendance goal?
 - Decide on an attendance goal the group would like to have in order to consider this a successful event. Not all event goals need to be related to event size.
 - Items for consideration:
 - Does your venue have a capacity limit?
 - What attendance goal will best achieve the event outcomes?
 - Ex. Does the event involve small group dialogue, or a goal of alumni making one-on-one connections, which may benefit from a smaller event size?

- Please provide event capacity on the UOAA Event Form if the size of the event has a maximum number of spaces (either based on capacity, or size limit as determined by the group).

REGISTRATION

These questions will allow UOAA to build your event using the appropriate features to fit your needs. Adding registration to an event after the event has been created is not possible, so please confirm all registration needs before submitting the UOAA Event Request Form.

Questions:

- Do you need to collect registration in advance of the event?
 - Items for consideration:
 - Will you want to have pre-printed nametags?
 - For pre-printed nametags from UOAA, we need five business days between closing registration and the event to process and print nametags and mail them.
 - Does your venue or event have a maximum capacity?
 - Do you need to have a headcount to provide to the caterer?
 - Is there a registration deadline?
- Do you plan to collect event registration via a third-party site?
 - Ex. If you are hosting the event on Zoom exclusively, it may be better to host registration via zoom; or does your event require purchase of sports tickets through an affiliate link?
 - For basic event registration that does not include a need for a third-party vendor, you will use UOAA's event registration rather than other sites (ex. Eventbrite), since UOAA's platform allows for connecting registration to alumni records.
 - In some cases, UOAA may recommend registration through another contracted UOAA vendor (ex. Using SchoolAuction.net for registration for a Signature Event with an auction component)
- Are there specific items that you need to include in the event registration?
 - Standard registration fields (included unless the group requests otherwise):
 - Name, email address, UO degree year, phone, address, affiliation multi-select (alumni, friend, faculty/staff, parent, student)
 - Items for consideration:
 - Does your event have a served meal that requires dietary restrictions?
 - Do you have specific information that you want to provide on nametags (ex. Job title/ employer, number of years a person has lived in the area, etc.)
- Is the event in-person, virtual, or hybrid?
 - Items for consideration:
 - Does the event lend itself better to a virtual event than being in person?
 - Do you plan to offer a livestream of the event?
 - Will a hybrid option add value to your event? Will it change or take away from the in-person experience? Will it add complication? (They usually do)
- Will there be a registration fee?

- Even a minimal event fee can reduce the number of no-shows to an event. Make sure to be clear about what event attendees are getting in exchange for their event registration to show the value of the registration.
- Items for consideration:
 - Is the group trying to fully recoup event costs through registration?
 - What discount will you provide for UOAA Members?
 - Are children allowed at the event? If so, is there a different price for child registration vs. adult registration?
- Are registrants allowed to bring guests, or would you like each person attending to fill out their own registration?
 - Do you need to collect guest names? Or only the number of guests they will be bringing? If you are pre-printing nametags, you will want to collect guest names.

VENUE AND VENDORS

In general, all vendors, with the exception of some UO campus vendors, require a contract. Contracts must be submitted by the UOAA staff member to Financial Services to process and ensure that terms fit with UOAA policies and insurance. Contracts need to be signed by all parties including the UOAA Executive Director. Submitting vendor information well in advance of the event helps with smooth processing of contracts in case of any questions or negotiations required.

Your UOAA staff member will help facilitate the contracting process and ensure all required documents are submitted. A W9 is required for all vendors as part of the contract process. Group volunteers can request the W9 from vendors early on in the process to make the contract timing more efficient.

Questions:

- Where do you plan to host your event?
 - Items for consideration:
 - Is the venue convenient for the target audience and event time?
 - Does the venue require payment? Is a deposit required?
 - Does the venue require the group to work with specific vendors for catering, event rentals, etc.?
 - What is parking or public transportation like at the venue? We'll want to communicate those details to attendees through pre-event emails.
- What other vendors will be needed?
 - Vendors to consider:
 - Catering
 - Alcoholic beverages (if not included in catering)
 - Make sure to have non-alcoholic beverages available, either through your bartending service or caterer. Non-alcoholic beverages should be free for attendees.
 - Equipment rental (tables, chairs, A/V equipment, etc.)
 - Some venues provide in-house equipment rental. If they do not, consider asking your venue if they have recommended vendors they work with regularly who know the space.

- Décor
 - Ex. Flowers, balloons, center pieces, additional furniture

MARKETING

UOAA provides email marketing and social media marketing from the main UOAA accounts.

Questions and tasks:

- Who is assigned to submit draft promotional copy to the UOAA?
 - Volunteers are encouraged to write draft copy describing your event, since you know it best, but you can request assistance from UOAA.
 - UOAA has an event copy template that your UOAA staff member can provide as a guide.
- What type of design do you want for the event?
 - Items for consideration:
 - Is this an annual event with a specific theme that should remain consistent?
 - Are there sample images you can provide to help guide the designers?
 - Will the event graphics be designed by someone in your group or by UOAA?
 - If you want to contract with an outside designer, please contact your UOAA staff member regarding the process.
 - Graphic Design Specs needed:
 - Event header (1024x520)
 - Email header 600px wide
 - Social posts 1:1 aspect ratio (1200x1200, limited copy)
 - UOAA Cal thumb 3:2 aspect ratio; no text (600x400)
 - Instagram and Facebook Story (1080x1920)
 - Facebook photo posts (1200x630)
 - Facebook page cover image (851x315)
 - Facebook event cover photos (1200x628px)
 - 4 winds (1920x1080 digital display) (Eugene and PDX events)
- Create a social media campaign calendar.
 - Items for consideration:
 - What social media channels will best reach your target audience?
 - Do you want to include paid promotions for the event? On which channels?
 - If so, reach out to your UOAA staff member to discuss placement of paid social ads, budget, etc.
 - Would you like to request UOAA to promote via the UOAA main channels?
 - UOAA Comms will provide feedback on whether this makes sense based on your target audience and alternate suggestions if it does not.
 - Should other UOAA/UO groups be tagged in posts (co-sponsors, groups that would be interested in the event).
 - Consider writing and scheduling posts in advance.

EVENT DAY

Questions and tasks:

- Have you identified volunteers for the event?
 - Items for consideration:
 - Assign volunteers to specific roles prior to the event so each volunteer knows what they are responsible for.
 - If possible, do not assign the event lead to a specific role to ensure they are available for vendor questions or troubleshooting.
 - Do you need to have multiple volunteer shifts?
- Do you need any event materials?
 - This includes decorations from UOAA (pom poms, table tents, etc.) or to be ordered.
 - Items for consideration:
 - Any branded items need to be ordered through UOAA, as a contract is required to use the logo. Be sure to leave ample time (3 months prior to event) for the contracting process, production, and shipping.
 - Will anything need to be mailed from UOAA? To whom should it be mailed?
 - Include consideration of pre-printed nametags.
 - What printed materials are needed for signage and information for attendees?
 - Should there be QR codes linking to get involved forms or scholarship giving?
- Post-event wrap-up needs:
 - Who is responsible for sending attendance information to your UOAA staff member?
 - Should there be a thank you email sent to attendees?
 - If so, please include the desired language in the copy provided for the event.
 - Is there other follow-up necessary, such as messages to new attendees or meeting with attendees who have expressed interest in getting involved?

SOCIAL MEDIA GUIDE

Social Media Accounts

The UOAA has the following social media accounts:

- [Facebook](#)
- [Instagram](#)
- [LinkedIn](#)
- [Twitter](#)
- [YouTube](#)

Chapter and network social media accounts

The UOAA's chapters and networks have social media platforms. We encourage volunteers managing these accounts to collaborate with both the main UOAA accounts and other chapter/network accounts by liking, commenting, and re-posting each other's content.

[Review a list of chapter and network social media handles.](#)

Important note: A UOAA staff member must have admin access to your chapter/network social media accounts. This can be your program manager on the engagement team and/or a member of the UOAA communications team. For questions, reach out to your program manager or April Miller, UOAA assistant director of communications, at anmiller@uoregon.edu.

CREATING A NEW SOCIAL MEDIA ACCOUNT FOR YOUR GROUP

Start by talking with your UOAA engagement liaison. Together, you will go over the social media checklist form and submit that to UOAA communications. UOAA Comms will then set up a meeting with the liaison and volunteer to review the checklist and UO and UOAA standards and guidelines. Prior to establishing the account, the chapter/network must have a short-term (2-3 months) social media strategy and content calendar created.

Note: All admins must receive UO brand and social media training prior to gaining access to the account. If at any time the chapter/network does not have a representative to manage their account for longer than 3-5 months, the UOAA may delete or hide the account.

SOCIAL MEDIA CONTENT

Social media requires consistent interaction. While frequency of posts will vary by chapter and network social media account, we recommend 2-3+ posts per week on Facebook, LinkedIn, and Twitter, and 1-2+ posts per week on Instagram. There should be no more than one feed post per day on Instagram, but multiple stories can be posted in one day. On other channels, multiple posts can be shared in one day if they are spaced out. Ex.: 9:00 am, 12:00 pm, 4:00 pm, 8:00 pm. View insights for each platform to determine the best times to post.

Utilize the [UOAA's content calendar spreadsheet template](#) for content ideation and caption writing.

PHOTO AND VIDEO CONTENT FOR SOCIAL MEDIA

Each platform has different guidelines for posting photo and video content. Here are recommended image and video dimensions/specs for various types of content.

Facebook

- Image sizes & specs:
 - Posts and timeline photos (when posting a single image): 1200x630px
 - Carousel posts (sharing 2-10 images in one post): 1200x1200px
 - Page cover photos: 851x315px
 - Facebook event cover photos: 1200x628x
 - Stories: 1080x1920x
 - Profile photo: 170x170px
 - Upload images as a JPG or PNG file to avoid any compression or distortion.
- Video sizes & specs:
 - For sharing videos to your Facebook page:
 - 1280x720px are the recommended dimensions.
 - Best video formats are .MP4 and .MOV.
 - Maximum video length is 240 minutes.
 - The maximum file size you can upload is 4GB.
 - For sharing videos to Facebook reels:
 - 1080x1920px are the recommended dimensions.
 - Best video formats are .MP4 and .MOV.
 - Maximum video length is 90 seconds.
 - For sharing videos to Facebook stories:
 - 1080x1920px are the recommended dimensions.
 - Best video formats are .MP4 and .MOV.
 - Maximum video length is 120 seconds.

Instagram

- Image sizes & specs:
 - Recommended Instagram post sizes (feed photos):
 - Landscape: 1080x566px
 - Portrait: 1080x1350px
 - Square: 1080x1080px (most recommended)
 - Aspect ratios between 1.91:1 and 4:5 are supported.
 - Note: When posting carousel posts (multiple images), you will need to select one aspect ratio for all photos.
 - Profile photo: 320x320px
 - Instagram stories: 1080x1920px

- Video sizes & specs:
 - For sharing Instagram reels:
 - 1080x1920px are the recommended dimensions.
 - Best video formats are .MP4 and .MOV.
 - Max file size is 4GB.
 - Maximum video length is 90 seconds.
 - For sharing non-reel in-feed videos:
 - 1080x1080px or 1080x1350px are the recommended dimensions.
 - Max file size is 4GB.
 - Video length can be 3 seconds to 60 minutes.
 - For sharing videos to Instagram stories:
 - 1080x1920px are the recommended dimensions.
 - Maximum length is 60 seconds per story. We recommend limiting this to 15-30 seconds.
 - Max file size is 4GB.
 - For sharing Instagram Live videos:
 - Vertical video (1080x1920px) is recommended.
 - Maximum size and length is 4GB for four hours of video.

LinkedIn

- Image sizes & specs:
 - Posts and blog posts: 1200x627px
 - Profile photo: 400x400px
 - Page cover photo: 1128x121px
 - Event cover photo: 1600x900px
 - LinkedIn group banner: 1536x768px
 - Upload images as a JPG or PNG file to avoid any compression or distortion.
 - To create a carousel post on LinkedIn, try creating a PDF with photos at 1080x1080 or 1920x1080px. Upload the PDF to the post, and it will create a carousel users can flip through to look at all the photos.
- Video sizes & specs:
 - The resolution range for LinkedIn videos is 256x144 to 4096x2304px.
 - Max file size is 5GB.
 - Videos can range in length from 3 seconds to 15 minutes when uploading from desktop. When uploading from the LinkedIn mobile app, the max length is 10 minutes.
 - Best video formats are .MP4 and .MOV.

Twitter

- Image sizes & specs:
 - Profile photo: 400x400px

- Header photo: 1500x500px
- For tweets, 1600x900px is recommended. Square photos at 1080x1080 also work well.
- Supported files are GIF, JPG, and PNG.
- Video sizes & specs:
 - Recommended dimensions are 1280x720 (landscape), 720x1280 (portrait), or 720x720px (square).
 - Max file size is 512MB.
 - Max length is 2 minutes, 20 seconds.
 - A great option for sharing videos longer than 2 minutes, 20 seconds on Twitter is to share a link to a YouTube video, as Twitter will embed this in the tweet. This means the YouTube video will be clickable/playable directly within Twitter.

GIFs

Are rarely used – and if so, usually during campaigns like #DucksGive and #RivalryWeek

Photo quality

Be sure that photos used have a high resolution and are optimized for the platform you are posting to. Additionally, pay close attention to the contents of the image/video. When taking photos and video at events, frame the photo higher than empty beer glasses/food plates on tables and encourage alumni to set down their drinks.

Royalty free photos

Free photos and video clips are available here:

[Upspalsh.com](https://www.upspalsh.com)

[Pixabay.com](https://www.pixabay.com)

[Pexels.com](https://www.pexels.com)

Hashtags and Tags

#Hashtag

Whenever possible use hashtags, which allow for people to find certain posts more easily on social networks. The UOAA's hashtags are:

General UOAA:

#UOAlumni
#DuckAlumni
#OnceADuckAlwaysADuck
#AlwaysADuck
#DucksForever
#DucksForLife
#ScoDucks
#GoDucks
#OregonDucks
#UofOregon
#UofO
#DuckPride
#DuckProud

General Athletics:

#GoDucks
#ScoDucks
#ProDucks

Football:

#UOAATailgates
#UOAAWatchParties
#GoDucks
#ScoDucks
#MightyOregonTailgate
UOAA Programs:
#UOAATailgates
#UOAAWatchParties
#DuckTravels

Chapter hashtags:

Use your chapter name as a hashtag.
For example: #AlaskaDucks, #DCDucks, #UOBlackAlumni, etc.

Tags

Use tags whenever possible. Using tags is a way to allow our content to be found by others. It furthers the reach of each post and allows people to see what we say about them and vice versa.

Campaigns

#UOAlumni

The official hashtag of the UO Alumni Association is #UOAlumni. Follow along on the #UOAlumni and add your voice to our story when you include #UOAlumni on your social media posts.

#DucksGo

When #DucksGo, they go everywhere! This exciting social campaign shows UO Alumni travelling all around the world showing their Duck pride. As you plan your travels, be sure to pack your UO gear and share your awesome pictures with us using #DucksGo or email alumni@uoregon.edu.

#DuckLoveStories

Did you meet your partner or spouse at the UO? Each year around Valentine's Day we ask Ducks to share their stories of how they met their special someone through a connection to the UO. Use #DuckLoveStories on social media. Submit your own story to be included in a future campaign.

#DuckBabies and #DuckPets

We can't get enough of babies...and pets! If you have a new addition to your family and they are in UO gear, share your announcement using #DuckBabies or favorite moment with your pet using #DuckPets.

Tips

Monitor Comments. By having a social media presence that welcomes comments, we build credibility and community. You do not have to respond to each comment, but it is good practice to reciprocate likes and comments when appropriate. NOTE: Questions and concerns sent via messenger should receive quick responses. An appropriate goal is to respond within 24 hours.

Be the First to Respond to Your Own Mistakes. If you make an error, be up front about your mistake and correct it quickly. If you choose to modify an earlier post, make it clear that you have done so. Deleting a post should be a last resort. If/when an instance like this arises, reach out to your UOAA staff liaison for guidance.

Respect Copyright Laws. Follow laws governing copyright and fair use or fair dealing of copyrighted material owned by others. Always attribute quotes and work to the original author/source.

Be Accurate. Make sure that you have all the facts before you post. It's better to verify information with a source first than to have to post a correction or retraction later. Cite and link to your sources whenever possible—that's how you build community.

Quality Matters. Use a spell-checker.