

CSUSB Alumni



CSUSB Alumni Association

This manual contains the CSUSB Alumni Association polices and guidelines for all Chapters.

*#Coyote*4LIFE

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Contact Information (as of Spring 2019)

California State University, San Bernardino

Alumni relations, AD-121
 5500 University Parkway
 San Bernardino, CA 92407
 (P) 909-537-3700 (F) 909-537-7052
alumni@csusb.edu

Chapter Support Staff

Crystal Wymer- Lucero

Director-
Office of Alumni Relations

Clucero@csusb.edu

Michael Arteaga

Alumni Engagement Specialist

marteaga@csusb.edu

Jenna Archuleta

Office Coordinator

Jenna.archuleta@csusb.edu

Chapter Email

EOP Alumni Chapter

eopalumni@csusb.edu

Latino Alumni Chapter

Latinoalumni@csusb.edu

Pan African Chapter

PanAfricanAlumni@csusb.edu

Faculty and Staff Chapter

FacultyStaffAlumni@csusb.edu

Undocumented Alumni Chapter

Undocualumni@csusb.edu

Website

alumni.csusb.edu

Office Hours

Monday – Friday
 8:00 a.m. – 5:00 p.m.

Summer Hours:

Please check CSUSB Alumni website for summer office hours and dates.

Monday – Thursday
 7:30 a.m. – 5:30 p.m.

CSUSB Alumni

Dear Alumni Chapter Leaders,

On behalf of CSUSB's Office of Alumni Relations and the Alumni Association, I would like to thank you for accepting the extraordinary and fulfilling role of leader in our chapter program. You join a large and dedicated group of volunteers who are committed to keeping CSUSB alumni connected to the university and each other.

The Alumni Chapters program has the unique ability to engage a wide breadth of alumni—both geographically and demographically—while at the same time building a network that celebrates and supports CSUSB and the university. By volunteering your time, energy, and talent in this program, you and your chapter's board members play an essential role in CSUSB's central mission to support and serve our alma mater.

We hope your chapter finds great success and unity, and that together we can create a forum for engaging social and educational opportunities for you and your members. The following pages support that effort by providing guidance on how to build and sustain a CSUSB Alumni chapter.

Thank you for the important work you are doing to advance your alma mater. Our team looks forward to working with you.

Crystal A. Wymer-Lucero
Class of 2007
Director
Office of Alumni Relations

Mike Arteaga
Class of 2010 & 2017
Alumni Engagement Specialist
Office of Alumni Relations

CSU and CSUSB Alumni Association Policies

All Chapters will adhere to the CSUSB Alumni Association (CSUSBAA) policies set forth by the California State University system (CSU), the CSU Board of Trustees, and California State University, San Bernardino (CSUSB).

The CSUSBAA is a non-profit organization under the non-profit status of the University Enterprise Corporation (UEC) and will adhere to the policies set forth by the UEC.

Copies of the CSU and CSUSB policies are available in the CSUSBAA office and on the CSUSBAA website.

Definition of a Chapter

A Chapter is an approved affiliate of the CSUSBAA governed by a set of CSUSBAA policies and Chapter bylaws. A Chapter consists of a group, no less than 20 (combination of Board and Chapter members), of alumni who, through their activities and association, support CSUSB and CSUSBAA and meet the requirements set forth below.

Geographic Chapters

Are for alumni of CSUSB in a specific region (OC Area, San Diego, LA, etc.).

Affinity Chapters

Bring together alumni and friends with a shared common attribute or activity (Pan African alumni, Faculty and staff alumni, athletic alumni, EOP alumni, etc.).

Academic Chapters

Are comprised of alumni and friends who graduated from a specific academic discipline (music, biology, history, etc.).

Purpose of a Chapter

The primary purpose for forming a chapter is to establish or advance a mutually beneficial relationship between CSUSB, its alumni, and friends by providing an avenue for alumni to continue connections with CSUSB through special interest or affinity-based groups.

The mission of the CSUSBAA is to build lifelong alumni relationships by:

- Contributing to a positive CSUSB image.
- Promoting university and alumni accomplishments.
- Providing a network opportunity for alumni interaction.
- Developing economic and social benefits for our students and alumni.
- Fostering a continued relationship with students so that they will play an active role as alumni.

Chapter Bylaws

All Chapters of the CSUSBAA must have their own Bylaws to govern the Chapter functions.

Chapter Bylaws include:

- Chapter name and purpose.
- A clause stating that membership will not be denied on the basis of gender, ethnic origin, age, marital status, disability or sexual orientation.
- An officer clause stating terms of office, specific procedures for regular elections and duties of officers.
- An amendment clause stating that all amendments to the Chapter's Bylaws must be submitted to the CSUSBAA for approval.
- A clause stating that all gifts, donations, and contributions will be accepted in a manner consistent with CSUSBAA and University Advancement financial policies.
- A meeting schedule.
- A list of standing committees.

Requirements to Serve

Graduate/Alumni of CSUSB

All board members of the chapter must be a graduate or alumni as defined by the Alumni Relations office. Member is anyone who had complete their degree at CSUSB or has complete a total of 90 units at CSUSB or its equivalence in new semester system.

Must be a dues paying member of the alumni association

All board members must be dues paying members (annual or lifetime members) in order to serve as a board member. Annual member's fees are \$40 per year from the date you paid your dues. Lifetime membership is \$400 per member. Other options include dual membership for married couples (both alums, both spouses, and living at the same address) for \$65 annually and \$650 for lifetime.

Chapter Board Members

- A Chapter Board shall consist of elected members. It is encouraged that no more than 50% of the Board members be CSUSB faculty, staff, or students. Board Members shall be elected by majority approval of the Chapter.

Chapter Memberships

- All Chapter members must be members of the CSUSBAA. Beyond this requirement, membership is determined by each individual Chapter.
 - If, however, the Association refuses membership, then membership is also refused at the Chapter level.
- Membership in a CSUSBAA Chapter is granted on an annual basis.
- CSUSBAA members will not be assessed a fee to join a Chapter.
- New Chapter members can join at any time during the year.

Election Process

- Elections shall take place between April and June to be finalized by July 1st the start of the CSUSB fiscal year.
- A ballot or Slate of officers shall be sent out to the chapter interest/membership via email to be voted upon.
- If number of candidates do not exceed the number of positions open the board can vote in new board members, if they number exceeds the number of open positions and is a contested election the vote will go to the general membership.

Recommendation:

- Appoint election committee Chair, someone who is not up for elections for the upcoming term.
- Decide how many board members you would like to have join the board
- Committee made up of volunteers from general interest/membership.
- Timeline:
 - April Call for Nominations/Applications
 - May Committee review and ballot created
 - Mid- May – early June election ballot sent out
 - First meeting in July transitional meeting Welcome new board member to meeting/thank those who will be ending their terms as board members

Chapter Expectations

- Chapters shall maintain a minimum of 20 Chapter members to be considered sustainable and active.
- Chapters shall have a minimum of three leadership positions held by three different Chapter members in order to be sustainable: President, Secretary, and Treasurer.
- Chapters shall have Bylaws that adopt the policies of the CSUSBAA Chapter Manual.
- Chapters shall submit Bylaws to the CSUSBAA when updates occur.
- Chapters shall hold at least four meetings per year and participate in or host two events per year.
- Chapters shall record all meeting minutes and send to the Board and CSUSBAA within a week of said meeting.
- Chapters shall provide a roster of Board members' contact information and promptly inform CSUSBAA of any updates to contact information.
- Chapters shall submit a listing of all events planned for the upcoming year to the CSUSBAA. If an event is added to the schedule, Chapters shall submit the event details at least 30 days in advance to the CSUSBAA.
 - It is required to keep the CSUSBAA informed of Chapter plans and activities. This is mutually beneficial to both the Chapter and the CSUSBAA in order to better promote events on the alumni website, social media pages or alumni newsletter and offer event support or supplies. Information about Chapter events can also

be shared with alumni and friends calling the office inquiring about alumni activities in their area.

- Chapters shall submit a Chapter Event Planning Form for all events. (See Appendix 1 for form)
- Chapters shall submit a Chapter Event Summary following each event to the CSUSBAA Chapter Liaison no more than 1 week after an event has occurred. (See Appendix 2 for form)
- Chapters shall operate within a fiscal year that coincides with the CSUSBAA's.
- Chapters shall adhere to all University and CSUSBAA policy and standards.

Alumni Relations Staff Support

The alumni Relation office is here to provide support to the chapters to help insure the success of the chapters mission.

Chapter Liaison

An CSUSB AR staff member will manage and support chapter program.

Current Chapter Liaison: Mike Arteaga

- Serves as chapter leadership point of contact
- Develops chapter tools and resources
- Handles chapter event promotion (email, postcards, Facebook ads & website postings)
- Sends membership and rsvp reports
- Supports the recruitment of new chapter volunteers

Financial Staff Support

Current Financial Staff Support Member: Jenna Archuleta

- Manages chapter budget
- Manages the reimbursement process
- Provides chapter finance reporting.
 - Please allow one week to gather all data

Director of Alumni Relations

Current Alumni Relations Director: Crystal Wymer-Lucero

- Advocated for chapter support programs to university administration
- Provides update of university communications to the chapter chairs
- Works with chapter liaison to the Alumni Association Board of Director

Chapter Marketing and Communication

CSUSBAA Visual Identity

All Chapter marketing materials and communication must follow the CSUSBAA visual identity guidelines.

All Chapter marketing materials and communication must follow CSUSB and CSUSBAA visual identity guidelines.

- First reference to the Chapter in any marketing/communication material will read: “CSUSB Alumni Association’s _____ Chapter”.
- After the first reference, the Chapter can refer themselves as the _____ Alumni Chapter.
- Chapter will use the official CSUSBAA Chapter logo on all marketing/communication materials.
- Chapter will follow the CSUSB Style Guide (available online), especially with regard to the use of the Chapter logo.
- Chapter marketing/communication materials (i.e. flyers, e-blasts, and graphics) can be created by the CSUSBAA. Chapter marketing/public relations officers are encouraged to work with CSUSBAA to create marketing/communication materials.
- Chapter marketing/communication materials should be sent to the CSUSBAA Chapter Liaison for review.
- Graphics or spirit marks that will be representative of the Chapter should be sent to the CSUSBAA Chapter Liaison and the Office of Strategic Communication for approval. However, logo and graphics will need to follow the university and CSUSBAA guidelines.

Review includes verifying that logos and graphics are used properly; Chapter name is listed correctly, and content is edited for grammar and coherency.

Trademarks

All CSUSBAA trademarks are the exclusive property of CSUSB and CSUSBAA. Unauthorized use of any CSUSBAA trademark, service mark, or logo may be a violation of federal and state trademark laws.

Flyer/Graphic Design

The Office of Strategic Communication will be supporting the Chapters in the development of marketing materials that adhere to the university policies and foster synergy and consistency to the university brand.

The strategic communication Graphic Designer will work with CSUSBAA and the Chapters to create marketing materials and graphics. Once submitted, projects will be assessed and accepted based on current workloads within 48 business hours.

- All flyer or other content requests must be submitted to the CSUSBAA Chapter Liaison at least two months prior to when the flyer is needed or other requested deadline.
- Depending on workload, the graphic designer will have 4 weeks for turn-around time for all proofs.
- If logos or other graphics are used, aside from those of the Chapter or CSUSBAA logos, the Chapter will provide high-resolution logos/graphics, preferably in EPS or PDF format, to the CSUSBAA.

Social Media

Newly launched Chapters can create social media accounts/profiles with advisement from the CSUSBAA. Existing chapters should utilize the already created social media accounts/pages. The responsible member is required to follow all CSUSB Social Media Guidelines (Appendix 8) and the CSUSB Social Media Handbook (Appendix 9) when representing the chapter to internal and external audiences.

All content on social media websites will follow the visual identity guidelines and practices of the CSUSBAA, and at least one CSUSBAA staff member should have administrative rights on the social media platform to be able to share immediate information pertaining to the Chapter and format pages when necessary.

All chapter events and programs shared for promotional purposes should be shared with CSUSB Alumni at least 2 weeks prior to the date of posting. Chapters should tag CSUSB Alumni to strengthen the relationships amongst the chapter followers and the CSUSBAA audience.

The following official hashtags should be used when posting and sharing about chapter events and programs.

Official hashtags: **#CSUSBAlumni #CSUSB #Coyote4Life**

Email Communication

All Chapter communication will follow the CSUSBAA visual identity guidelines described in this manual, section CSUSBAA Visual Identity.

- First reference to the Chapter in any marketing/communication material will read: “CSUSB Alumni Association’s _____ Chapter”.

After the first reference, the Chapter can refer themselves as the _____ Alumni Chapter.

- Chapter will use the official CSUSBAA Chapter logo on all marketing/communication materials.
- Chapter will follow the CSUSB Visual Identity ([available online](#)), especially with regard to how to use the Chapter logo.
- Chapter marketing/communication materials should be sent to the CSUSBAA Chapter Liaison for review.

Review includes verifying that logos and graphics are used properly; Chapter name is listed correctly, and content is edited for grammar and coherency.

Email Blasts

Chapter will have the opportunity to send e-blasts to the Chapter membership through which the CSUSBAA will distribute.

- All e-blasts requests must be submitted to the Alumni Association at least **3 weeks** prior to the initial scheduled date for the e-blast.
- All e-blasts will be sent to alumni at least **two weeks** prior to date of event or program.
- It is encouraged to send event invitations with more than 2-weeks’ notice to Chapter members.
- All e-blasts will be sent to Chapter members unless a request is made to send beyond Chapter membership.
- All requests must be coordinated and scheduled with CSUSBAA.

Alumni outside of the Chapter membership have not formally requested to receive emails from the Chapter and, therefore, communications must be well-coordinated with other campus email campaigns.

*CSUSBAA will need to request a data pull of alumni emails from University Advancement and requests typically take 1 -2 weeks to process.

Email Formatting

- All emails will have text in the body of the email for ADA-compliance purposes. Flyers or documents cannot be attached.
 - Chapters are encouraged to work with CSUSBAA to develop HTML and ADA compliant e-blasts.

Photography

Request for photography services from the Office of Strategic Communication is required through your Chapter liaison.

Approval for photography will be based on the type of event, date, time, location and availability of photographers.

Requests should be submitted 6-8 weeks prior to the date of the event. The chapter will be notified once a decision has been made from the Office of Strategic Communication.

Chapter Finance

Chapter Funding

- The Chapter shall have two accounts established under the CSUSAA:
 - Trust Liability Account to pay for events.
 - Gift Account to provide gifts/stipends for students.
- Under no circumstances shall the Chapter retain funds with members or set up an independent banking account.

Funds Request/Spending Funds

- All funding requests will need to be submitted to the CSUSBAA office.
 - If a purchase needs a Purchase Order, allow a 5-week processing time before purchase can be made.
- The Chapter is responsible for utilizing funds in a manner consistent with the university's policies and procedures (CSUSB Alumni Association, CSUSB Advancement Division, CSUSB Philanthropic Foundation, and/or CSUSB University Enterprise Corporation).
 - Refer to the Procurement Procedure (Appendix 5) document for deadlines.
- All use of Chapter funds requires majority approval of the Chapter board members.
- All events and activities conducted by the Chapter will serve the purpose and/or mission of the Chapter and the CSUSBAA.
- All use of Chapter funds will follow the guidelines set forth by all applicable entities: CSUSB Alumni Association, CSUSB Advancement Division, CSUSB Philanthropic Foundation and/or CSUSB University Enterprise Corporation.

Chapter Fund Guidelines

- Purchase of tangible asset/capital must be approved by the CSUSBAA (such as tables, banners, tablecloths).
 - All tangible assets are considered property of the CSUSBAA and Chapter. A record of the item(s) and responsible party must be kept on file with the CSUSBAA.
- Payment Requests for Services/Independent Contractors
 - To be in compliance with federal, state, and CSU regulations, all requests of payment of services and service-related items must be preauthorized before services are performed. No payments for services will be made through Chapter accounts unless they are preauthorized by the CSUSBAA.
 - No Chapter member can sign contracts on behalf of the CSUSB Alumni Association and the Chapter. Contracts must be submitted to Purchasing Department for appropriate signature.
 - Services include (but are not limited to):
 - Any type of contracted services
 - Speaker compensation and reimbursements

- Honorariums
 - Performers
 - Printing Services
 - Mailing Services
 - Design Services
 - Video Services
 - Rental Services
 - Event Services
 - Catering/Food Services
 - Event Venues
 - Goods which have a service component such as: letterhead, envelopes, and other paper products that have been imprinted
 - Promotional items that have been imprinted
 - Items of appreciation/congratulations to donors or others that have been imprinted
- Deposits
 - All checks must be addressed to CSUSB Philanthropic Foundation. Checks that do not have a gift portion can be made out to CSUSB University Enterprise Corporation.
 - All cash must be given to a CSUSB Alumni Staff member or an assigned staff member immediately following the event, or by next business date, at which it is collected.
 - All deposits must be accompanied by a list of attendees and monetary amount given (donation and premium/non-donation). Also, please include the event/activity/program to which the deposits should be credited.
 - Gift Transmittal Form will be needed for all transactions that are part of a donation.
 - Reimbursements
 - All expenditures and contracts will be made through the CSUSBAA.
 - Anything that indicates a signature is required is to be considered a contract.
 - Signatures for contracts are provided by Purchasing Department.
 - Contracts
 - Under no circumstances should a Chapter member purchase or contract for items/services without the approval of the CSUSBAA.
 - Any expenditure made by Chapter members must have the pre-approval of the majority of the Chapter Board and then approval of the CSUSBAA. Any unauthorized purchases made may not be eligible for reimbursement.
 - Receipts must accompany any reimbursement request.

Chapter Events and Activities

All events and activities conducted by the Chapter will serve the purpose and/or mission of the Chapter and the CSUSBAA.

All events must follow the policy and procedures of CSUSB Alumni Association, CSUSB Advancement Division, CSUSB Philanthropic Foundation, and CSUSB University Enterprise Corporation. Policies will be posted on the CSUSBAA website.

Chapter Meetings

The Chapter may reserve meeting space on campus by sending a request to the CSUSBAA.

- On-campus meeting room reservations should be made no less than **one month** prior to the meeting to ensure availability.
- The Chapter will be responsible for facility charges related to any meeting space reservation. There are free meeting spaces available through the CSUSBAA.
 - The CSUSBAA may use AD-127 for free (pending availability and advanced notice).
 - Chapters related to other campus departments (i.e. EOP) can coordinate for meeting space with that department.

Chapter Events

The Chapter may reserve event space on campus by sending a request to the CSUSBAA.

- Event spaces book quickly; therefore, the CSUSBAA advises that requests be communicated to CSUSBAA at least **3 months** prior to event date up to 365 Days from the event.
- No Utility charges Hosting events 8 a.m. -10 p.m. on regular school days and 8 a.m.- 5 p.m. on weekends (excluding summer Campus closed Friday - Sunday)
- The Chapter will be responsible for facility charges related to any event space reservation.

Chapter Fundraisers

- Chapter funds will be designated through a Chapter account under the CSUSBAA within the UEC and Philanthropic Foundation.
- Fundraisers should have a clear and stated purpose, i.e. sponsorships, scholarships, future events, etc. Marketing and communications surrounding all fundraisers must include the intent of the event.
- All fundraisers need to have the advisement of the CSUSBAA in order to be in compliance with any University event and fundraising policies and procedures.

Forms:



GIK Form Ver 5
FINAL 2-17-15.pdf



GTF Form.pdf



Fundraising Event
Approval Packet 201

Opportunity Drawings/Controlled Games

- Opportunity Drawings
 - Before any drawing takes place it must be approved by the alumni office and advancement services
 - To be in compliance with state and CSUSB regulations, Chapters may offer opportunity drawings or door prizes at events.
 - 90/10 rule: 90% of the gross receipts generated by the sale of raffle tickets for any given drawing are to be used by the eligible organization for charitable purposes. For example: An organization raised \$100 in ticket sales. It would be required to spend \$90 of that amount to further its charitable purposes, and only \$10 could be used to help pay for expenses or operating costs associated with conducting the raffle.
 - Under no circumstances can 50/50 drawings be held, as they are illegal under California law.
 - All raffles must be registered with the Attorney General's Registry of Charitable Trusts for approval, unless the raffle does not involve participants to pay for a chance to win. The Chapter is to notify the CSUSBAA of all raffle events including how much was raised.
 - Advertisement for raffles may be done on the Internet.
 - Purchase of an opportunity drawing or raffle ticket is not eligible for tax deduction.

Fundraiser forms



csusb_fundraising_
event_approval_mat

https://www.csusb.edu/sites/csusb/files/csusb_fundraising_event_approval_materials_v2.pdf

CSUSBAA Chapter Support

To aid in the success of Chapters, the CSUSBAA will provide support and resources as needed by Chapters in the following ways:

Organizational Support

- Maintain Chapter Membership rosters
 - Due to privacy laws, CSUSBAA cannot disclose contact information.
- Manage RSVPs for events
- Provide nametags for events
- Sign contracts for events
- Reserve meeting/event space at CSUSB

Accounting Support

- Complete government and university compliance forms
- Maintain information on reporting, forms, etc.
- Keep track of Chapter funds
- Issue payments for approved purchases/rentals

Communication Support

- Email blasts to Chapter alumni
- Event postings – University Calendar, Alumni website, Social media, Alumni Newsletter
- A Chapter web page on the CSUSBAA website

Additional Support

- Advice, direction, and resources for planning events
- CSUSBAA staff attendance at events

Conflict of Interest

The only relationships that are specifically deemed not permissible are as follows:

- Any contract, other than an employment contract, directly between the CSUSBAA and Chapter officers.
- Any contracts between the CSUSBAA and a partnership or unincorporated association in which a CSUSBAA Chapter officer is a partner, or owner, or holder, directly or indirectly, of a proprietorship interest.
- Any contract between the CSUSBAA and a for-profit corporation in which a CSUSBAA Chapter officer is the owner or holder, directly or indirectly, of five percent or more of the outstanding common stock.
- Self-dealing, which includes utilizing any information not a matter of public record received by reason of serving as a Chapter officer for personal pecuniary gain regardless of whether a Chapter officer at the time or not.
- Interest in real property potentially within the master plan of the campus or under contract with the campus or its affiliates.
- Interest in any business or investment from a source which has, or foreseeably may be, contracted, or subcontracted, with the campus or its affiliates.

Appendix

Appendix 1: Chapter Event Planning Form

Chapter Event Planning

EVENT OVERVIEW

Events should be directly related to the Chapter's mission statement. All events must be communicated to the CSUSBAA prior to planning.

FILL IN WITH INFORMATION

EVENT PURPOSE

Events should have a purpose that is of significance and interest to CSUSB students, alumni, and/or the community.

FILL IN WITH INFORMATION

EVENT TARGET AUDIENCE

FILL IN WITH INFORMATION

EVENT TIMELINE

Space your activities evenly throughout the year to ensure adequate time for preparation and better attendance. Chapters are asked to host or participate in two events per year. Remember, quality, not quantity, is the key!

FILL IN WITH INFORMATION

EVENT PROMOTION

- CSUSBAA Newsletter (1 month in advance)
- CSUSBAA Facebook Page (2 weeks in advance)
- CSUSBAA Website (1 month in advance)
- Chapter E-Blast (3 weeks in advance)
- Press Release (1 month in advance)

PROPOSED BUDGET

FILL IN WITH INFORMATION

POTENTIAL EVENT PARTNERS

FILL IN WITH INFORMATION

SPONSORSHIPS/DONATIONS

Proposed list of sponsors or donors should be provided.

FILL IN WITH INFORMATION

SPONSORSHIP LEVELS / DONOR AMOUNT

Proposed Sponsorship levels should be described including the premium and donor amount. Any donations (\$ amount or gift-in-kinds) should be included.

FILL IN WITH INFORMATION

FACILITIES

Location of Event

FILL IN WITH INFORMATION

Location Tasks

- At CSUSB (tasks completed by CSUSBAA)
 - Indoor
 - Reservation of room(s)
 - Audio & Visual order
 - Set-up needs
 - Stage
 - Sound
 - Lighting
 - Electrical
 - Microphones
 - Podium stationed
 - Hand-held
 - Cordless (stand needed?)
 - Lavalier
 - LCD, DVD, overhead projector and/or screen
 - Laptop computer
 - Photography/ Videography
 - Flip chart, easels and markers
 - Lighting
 - Outdoor
 - Same considerations as indoor events

- Tent(s)
- Permit(s)
- Electricity
- Garbage disposal
- Emergency personnel

*General Rule: When using an outdoor facility, always discuss a severe plan.

- Off-Campus
 - Contract approved and signed by CSUSBAA

CATERING

- Contract approved by CSUSBAA
- Final head count due date

MENU

- Menu selection
 - Hors d'oeuvres
 - Buffet
 - Plated
 - Beverages (tea, lemonade and/or water)
- Cost per person (including service charge/gratuity)
- Service times

*General Rule: It is best to have waiters suspend service when the program begins.

- Cash or hosted bar

*General Rule: Always offer an alternative to alcoholic drinks.

PROGRAM

- Presentation
 - Run Through
 - Photo opportunities
- Emcee
 - Script
- Awards/plaques
 - Advance display

PROMOTION

- Chapter E-Blast
- Website
- Campus Calendar
- Alumni Newsletter
- CSUSBAA Alumni Facebook Page

PARKING

- Designated parking
 - Free or cost
 - Passes
 - Shuttle service

SIGNAGE

- Banners/Posters
- Alumni tablecloth
- Directional signs

DRESS CODE

- Attendee attire
 - Casual
 - Business casual
 - Business
 - Formal

To be filled out by CSUSBAA

| |
|-------------------------|
| Date turned to CSUSBAA: |
|-------------------------|

| | | | | | |
|---|--|---------------|--|--|--|
| | | | | | |
| | | TOTAL: | | | |
| | | | | | |
| Expense Description: Any expense for the event including printing, equipment rental, entertainment, food, speaker fees, etc. | | | | | |
| Vendor & Contact: Business name and the contact person with email or phone number | | | | | |
| Estimated Cost: Provide the maximum estimated cost | | | | | |
| Payment Method: PO or Chapter Officer Reimbursement | | | | | |
| Notes: Any special instructions | | | | | |

To be filled out by CSUSBAA

| |
|-------------------------|
| Date turned to CSUSBAA: |
| Account Number: |

Appendix 3: Chapter Event Review Summary Form

Chapter Event Summary

This form will help evaluate the success or failure of each event and assist in planning future activities. Complete and return to CSUSBAA.

CHAPTER NAME

FILL IN WITH INFORMATION

EVENT

FILL IN WITH INFORMATION

LOCATION

FILL IN WITH INFORMATION

DATE

FILL IN WITH INFORMATION

PURPOSE/GOAL OF EVENT

FILL IN WITH INFORMATION

ATTENDANCE NUMBERS (Attach copy of sign-in sheets)

FILL IN WITH INFORMATION

EVENT PROMOTION

- Chapter E-Blast
- Website
- Campus Calendar

- Alumni Newsletter
- CSUSBAA Alumni Facebook Page
- Chapter Social Media

PROFIT OF EVENT (if applicable)

FILL IN WITH INFORMATION

SUMMARY

Rate the success of this event:

- Very Unsatisfactory
- Unsatisfactory
- Neutral
- Satisfactory
- Very Satisfactory

Is/Will this be an annual event?

- Yes
- No

Overall comments regarding this event, including strengths and weaknesses:

FILL IN WITH INFORMATION

Form completed by:

FILL IN WITH INFORMATION

Appendix 4: Alumni Chapter Reimbursement Form

Alumni Chapter Reimbursement

Send form with original itemized receipt(s) to:

CSUSB Alumni Association
5500 University Parkway
San Bernardino, CA 92407

Form and receipts can also be dropped off at the CSUSBAA office (AD-121).

| |
|---------------|
| Name: |
| Chapter Name: |
| Address: |
| Event: |
| Event Date: |

Receipt 1

| |
|------------|
| Amount: \$ |
| Purpose: |

Receipt 2

| |
|------------|
| Amount: \$ |
| Purpose: |

Receipt 3

| |
|------------|
| Amount: \$ |
| Purpose: |

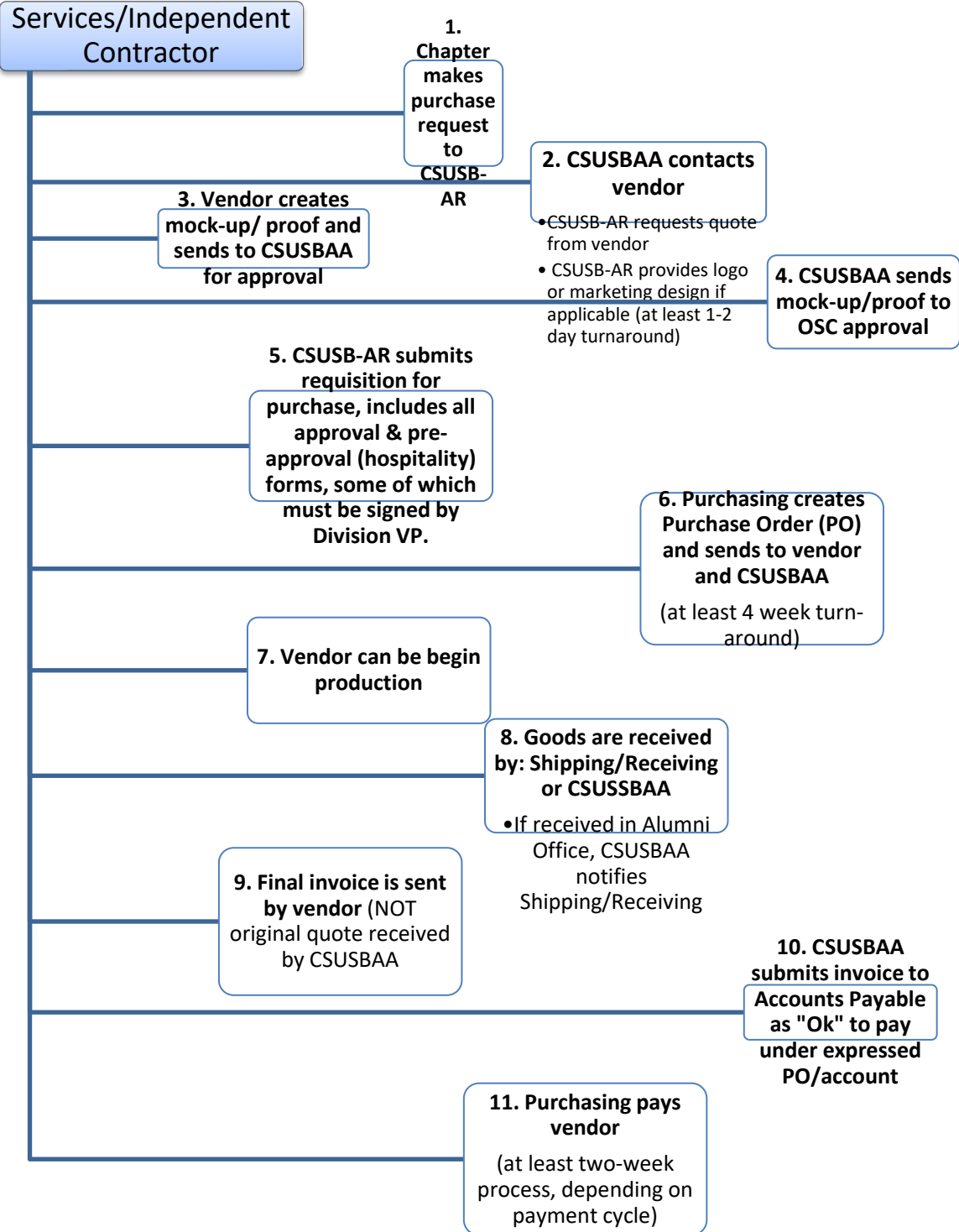
Receipt 4

| |
|------------|
| Amount: \$ |
| Purpose: |

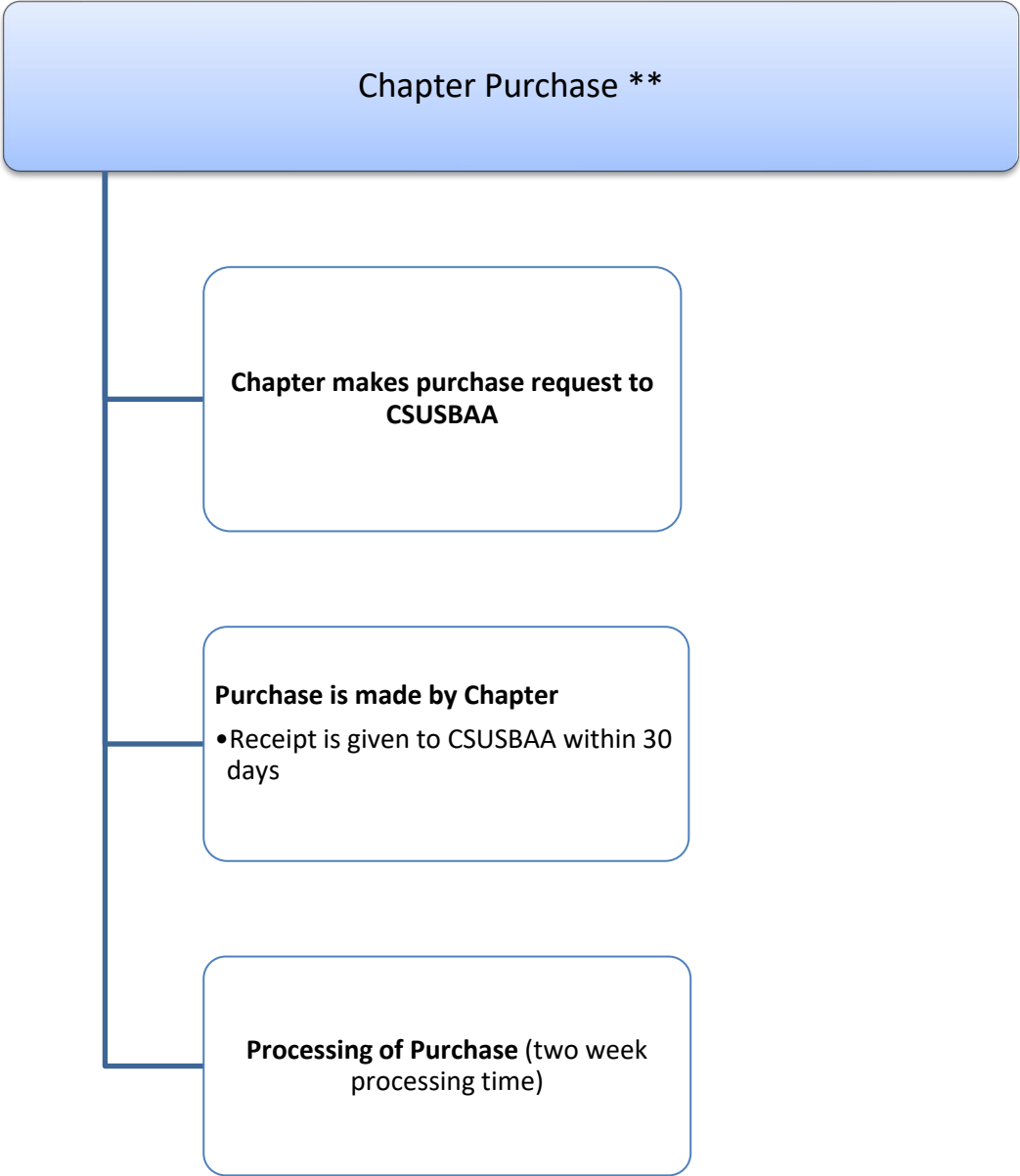
To be filled out by CSUSBAA

| |
|-------------------------|
| Date turned to CSUSBAA: |
| Account Number: |

Appendix 5: Alumni Chapter PO Process flow



Appendix 6: Alumni Chapter Reimbursement Process Flow



Appendix 7: New Board Member Information sheet

| |
|----------------|
| Name: |
| Chapter Name: |
| Address: |
| Phone: |
| Email: |
| Class year(s): |
| Polo Size; |
| |

Appendix 8: Social Media Guidelines



WE DEFINE THE *Future*

California State University, San Bernardino

Social Media Guidelines

These social media guidelines outline how CSUSB and its employees should conduct activity on university related social media accounts. The guidelines help maintain CSUSB's brand reputation and assists employees to responsibly share the university message. CSUSB should have a consistency in messaging, accuracy in information and social engagement with our followers.

1. **Be respectful** with your audience regardless of comments, messages, @ mentions, postings made to or about CSUSB and its departments. Be cautious in violating the first amendment.
2. **Engagement** is part of being inclusive and present with department followers. If they follow your account versus the main account, that is an indicator of a specific interest. Be responsive.
3. **False Information** being posted online can be damaging to the university and your department. Quickly correct any misleading or false content. If this happens, be accountable.
4. **Deleting or ignoring** comments, messages, @ mentions, postings made to any CSUSB account should be avoided. Unless life threatening or unsafe allegations are made, it is best to listen and respond carefully.
5. **Awareness** is key to ensure you are creating a positive and safe platform for students, faculty, alumni, donors, and friends of CSUSB. You as an individual are legally responsible for what you say or post on behalf of CSUSB. Be aware of liability.
6. **Referring** our followers especially students and alumni to incorrect departments, website, offices, etc. can be damaging the university's online presence and can result in losing followers, and/or engagement.
7. **Report** any threats made, defamation and derogatory content on social media immediately to your department head and the office of Strategic Communication for best course of action.
8. **Non-Biased** responses are the always the way to go on social media platforms when speaking on behalf of someone/something other than yourself. Racial, religious, gender, and political views are yours and not those of CSUSB; and therefore, need to be kept offline.
9. **Protect** the brand of this institution. CSUSB's [core values](#) should be reflected in your platforms.
10. **Have Fun.** Enjoy being engaged and involved with our students, faculty, alumni, donors and friends of the university. The world is constantly evolving to a more digital way of communicating – stay connected and engaged with Coyote family!

For questions regarding these guidelines or any university-related social media activity, please contact Elizabeth Ferreira at socialmedia@csusb.edu or 909-537-5007.

Rev 7/19

#Coyote4LIFE

Appendix 9: Social Media Handbook



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Media Handbook U

Appendix 10: Social Media/ Eblast Request Specifications

Data request specifications:

1. Describe if you need specific degrees, class years, etc. (No data will be shared with the requester) or social media platforms you would like us to share it to

Eblast template:

1. Subject line (150 characters)
2. Preview text (150 characters)
3. From (ex, Name of Department)
4. Reply email (College department or 'csusb.edu' domain email)
5. Content/body of the email (provide any graphics, links to RSVP forms, etc)
6. Footer (provide designated contact person full name and email)
7. Optional (provide social media handles)

Eblast schedule:

1. Provide a first and second preferred date for the initial email
2. How frequent after the initial email should your message be resend? (provide additional content for subsequent emails if needed)

Social media template:

1. Graphic to be posted (subject to approval from strategic communication)
2. Message to be added
3. Event details
 - a. Location?
 - b. Date?
 - c. Time ?
 - d. Attire ?
 - e. Food ?
4. RSVP Details
5. Primary contact

Social media schedule:

1. Provide a first and second preferred date for the initial post
2. How frequent after the initial post should your message be resend? (provide additional content for subsequent emails if needed)

*The Alumni Relation's office reserves the right to modify any verbiage/content that will be sent to our alumni constituents. As well as the frequency messages are sent out based on other scheduled emails/post.