
**UNIVERSITY OF MARYLAND
ALUMNI ASSOCIATION**

ALUMNI NETWORK VOLUNTEER LEADERS HANDBOOK



**ALUMNI
ASSOCIATION**

STAY FEARLESS

Updated September 2023

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WELCOME

Success is all about leadership; from our world-class faculty and staff; from the University of Maryland Alumni Association's Board of Governors; and from YOU, our network leaders.

The Alumni Association values the role each of you play in helping connect, cultivate and channel the power of alumni to enrich themselves and advance the university. You are our ambassadors on the ground, exponentially increasing Maryland's reach and connection to Terps around the world through regional, affinity, special interest, industry and academic networks.

We are committed to helping you succeed as network leaders. This includes equipping you with the tools and resources needed to identify and recruit board members; providing strategic direction on engagement events; sharing data and demographic information; allocating funds; offering best practices in alumni engagement and events; and sharing additional information outlined in this handbook.

In turn, we ask that you become familiar with the Alumni Association's priorities and encourage alumni to join, volunteer, advocate and give to the university. Please take the time to review this handbook and review the online version regularly with your leadership board, as it will be continually updated.

Thank you for your service. You are the heart and soul of the Alumni Association—our success is all thanks to you!

Sincerely,



Amy Eichhorst

Associate Vice President, Alumni and Donor Relations
Executive Director, Alumni Association
University of Maryland

MISSION, VISION
AND GOALS

STRATEGIC PLAN
PRIORITIES



MISSION

We connect, cultivate and channel the power of alums to enrich themselves and advance the university.



VISION

We inspire lifelong connections with a global network of Maryland alums.



NETWORK GOAL

The primary goal of our networks is to strengthen Terp pride among all alums and their connection with the university. Running a network is a collaborative effort between network volunteer leaders and the Alumni Association.



NETWORK OVERVIEW

Our academic, affinity, industry, special interest and regional alumni networks are an extension of the Alumni Association. Each network is chartered by the Alumni Association and serves as an advocate to its respective alumni populations. As such, we want to ensure that you have the resources you need to be successful and are also aware of certain guidelines. Alumni networks provide opportunities for alums to:

- Engage with other alums to expand their personal and professional networks.
- Identify and nurture volunteer leaders.
- Showcase Terp pride and stay connected with their alma mater.



EMPOWER TERPS TO LIVE A LIFE OF
MEANING AND IMPACT



EDUCATE AND ACTIVATE ALUMS TO
SERVE OUR COMMUNITIES AND SOLVE
THE GRAND CHALLENGES OF OUR TIME



ENGAGE EVERY STUDENT FROM DAY ONE



FOSTER TERRAPIN PRIDE

UMD ALUMNI ASSOCIATION
AT A GLANCE

MEMBERSHIP

22,607 14,725

Alumni Association Members Alumni Association Lifetime Members

NETWORK LOCATIONS



414,000+
TERP ALUMNI

NETWORK AND LEADERSHIP

43 Networks 12 Academic Networks
24 Regional Networks 7 Affinity/Special Interest Networks
182 Regional Leaders 59 Affinity/Special Interest Leaders
161 Academic Leaders 405 Network Leaders

EVENTS

262 Staff-led Events 18,751 Attendees
135 Network-led Events 2,495 Alumni Engaged

SCHOLARSHIPS

\$66,500 Awarded
20 Scholarships Awarded

29 ALUMNI
ASSOCIATION
STAFF MEMBERS

ADVOCACY

474 Terp Network Members
1,006 UMD Champions

CAREER

1,955 Participated in Career Week 9 Terp Coaches
33,327 Alums in Official LinkedIn Group
3,380 Connections Made



Data compiled from the 2023 fiscal year.

STARTING A NETWORK

HOW TO START A REGIONAL OR AFFINITY NETWORK

1. Check alumni.umd.edu/find-network to see if a network already exists.
2. Contact the Alumni Association at alumni@umd.edu. Our staff will work with you to find alums who share a common bond and send them a message to gauge their interest in creating a new network.
3. Know the volunteer expectations (see page 26).
4. Establish network leaders (see Network Leaderships Roles and Responsibilities on page 11 for more details).
5. Plan your first event!

OFFICIAL CHARTERING PROCESS

6. Hold a meeting with potential network leaders to prepare for charter approval. Action items that must be completed by leaders:
 - Collect 150 signatures on a petition. A minimum of 100 signatures must come from current Alumni Association members.
 - Complete a draft of network bylaws.
 - Develop a roster of network leaders with their assigned roles.
7. Email completed documents to the Alumni Association staff liaison, who uploads them for Alumni Association Board of Governors (BOG) members to review prior to the next BOG meeting. If the BOG approves the charter, an official letter (signed by the managing director and chief outreach officer) is created, which serves as “proof of charter.”
8. After charter approval, meet with your Alumni Association liaison about the next steps:
 - Establishing the EIN/tax ID number (see page 17).
 - Setting up a network bank account (see page 17).
 - Reviewing resources available to you as a chartered network (insurance coverage, email communication and event management, network page hosting, etc.).
 - Reviewing data policies.



THE NETWORK BOARD

We encourage our network leaders to form boards of 10 to 15 individuals. Each network shall have at minimum an executive committee composed of a president, vice president, treasurer and secretary. At the first meeting of the new fiscal year, current board members will appoint/elect leaders to any vacant positions on the network’s executive committee. If there are positions on the board that become open mid year, current leaders should fill those positions as soon as possible. Once established, the network shall also have an immediate past president serving in an ex officio position. Each alumni network leader must be a member of the Alumni Association.

Once appointed/elected to a network board, all leaders must sign the Volunteer Expectations for Chartered Networks form (see page 26).

ROLES AND RESPONSIBILITIES

- **President:** This individual will be the liaison between the board and the Alumni Association advisor. The president is responsible for planning, scheduling and leading network meetings and functions, often serving as a master of ceremonies at social functions and meetings. They are responsible for creating and submitting an annual strategic plan and events calendar as well as providing an annual fiscal snapshot for the network.
- **Vice President:** This individual acts as backup for the president and assumes the role of president should the elected president be unable to attend a meeting or event. In most cases, this person is also the president-elect and will assume the role of president after the current president’s two-year term concludes.
- **Treasurer:** This individual oversees and maintains all network finances, including the network checkbook, and provides updated financial reports during board meetings. All fiscal reports shall be included in meeting minutes. The treasurer will need to provide their Social Security number when they set up their bank account per US banking regulations.
- **Secretary:** This individual is responsible for recording minutes at meetings and sharing those minutes with the entire network leadership as well as their staff advisor after the meeting. This individual also takes primary ownership of the network email account which includes responding to emails.

NETWORK LEADERSHIP

- **Immediate Past President:** This individual acts as an advisor to the executive committee. They serve in an ex officio capacity and does not have voting rights.
- **At-Large Network Leaders:** These individuals are responsible for helping to plan and implement a variety of programming that engages local alumni.
- **Communications Chair:** This individual posts on social media at least once a week, ensures all network-led events are on the Facebook calendar and responds to emails in the network email account. This person will also sit on the Brand and Marketing Committee which meets quarterly.
- **Game Watch Organizer:** This individual organizes at least one game watch for football and basketball each season and develops partnerships with a local bar(s) for discounted pricing.
- **Membership Chair:** This individual has quarterly calls with the Director of Membership and communicates with board members on current membership initiatives. They are responsible for communicating exclusive benefit offers at events for members when possible, member flags on name tags and handling giveaways for members. They will also share talking points with board members on membership to be equipped to share at events with fellow alumni and will send follow up emails to non-members after events encouraging them to join.
- **GOLD Chair:** The GOLD Council is a group of recent graduates within the last 10 years who serve as ambassadors to the Alumni Association. GOLD Council members will each plan, coordinate and execute two events annually (one social and one professional development), specifically for recent graduates in their region or with their affinity.

TERM LIMITS

1. All positions, including the executive committee, are two-year elected terms. **2.** The current network leaders, in conjunction with their Alumni Association advisor, will select new volunteer leaders. **3.** Board members shall not serve more than three consecutive terms (six years) except for President, who may remain on the board for one additional term as Immediate Past President (a total of eight years maximum). **4.** If a board member is interested in remaining on the board past their three terms, they can rotate off the board as a voting member, serve in an advisory capacity and reapply in one year. A meeting with the Alumni Association staff advisor is required in addition to a vote by board members with at least 75% in agreement. The term cycle would start again for a maximum of three terms, six years.

MANAGING YOUR NETWORK

IDENTIFYING AND RECRUITING VOLUNTEER LEADERS

- Leaders should approach the vetting process for volunteers as if they were looking to fill paid positions in an organization. Below are some helpful tips:
- Conduct a needs analysis to identify what knowledge, skills, backgrounds and abilities they would like volunteers to possess:
 - Event planning experience
 - Financial management experience
 - Large personal and professional networks
 - Works well with a variety of people
 - Excellent communication skills
 - Computer skills
 - Organization skills
 - Be cognizant of the makeup of the current board and ensure that diversity in race, gender, age and professions is being taken into account.
 - Be transparent with potential volunteers and let them know what will be asked of them.
 - Use the network of current volunteers to help identify and approach prospective leaders. Consider inviting potential volunteers to be a guest at an event to experience it for themselves.
 - Use events to help identify candidates for leadership roles. In particular, keep an eye out for alumni who attend multiple events and display a strong sense of Terp pride.

DIVERSITY, EQUITY AND INCLUSION

The University of Maryland strives to create an inclusive environment where each member of our community feels that they belong and are empowered to reach their full potential. The University of Maryland Alumni Association is committed to purposefully advancing that goal while inviting our alums to become TerrapinSTRONG.

Through the Alumni Association's programming, we strive to have an organization where every alum feels that the Alumni Association is a place where they belong. We enrich the University of Maryland's impact by serving as a gateway for alums of all identities, abilities, backgrounds, socio-economic classes, and experiences to participate in programs that contribute to a united, respectful, and empowered Terp community. We commit to deepening our learning about diversity, equity, and inclusion, and hold ourselves accountable for evolving into the most just organization possible. As the Alumni Association for the flagship university in the state of Maryland, we feel a sense of responsibility to be leaders in this area.

Join us in the pursuit of a more just and equitable world. Commit to lifelong learning. Be active members of our Terp community and beyond. We invite all alums to join together as a Terp community in becoming TerrapinSTRONG.

- **Diverse:** The individual leaders who compose network boards are a reflection of the Alumni Association's values and beliefs about who should be empowered and entrusted with its most important decisions. We believe that all networks can better achieve their missions by drawing on the skills, talents and perspectives of a broader and more diverse range of leaders, and that the diversity of viewpoints that comes from different life experiences and cultural backgrounds strengthens board deliberations and decision-making.
- **Equity-focused:** Boards play a critical role in helping networks understand the context in which they work and how best to prioritize resources and strategies based on that reality. An awareness of how systemic inequities have affected our society and those the Alumni Association serves enables boards to avoid blind spots that can lead to flawed strategies, and creates powerful opportunities to deepen the Alumni Association's and the network's impact, relevance and advancement of the public good.
- **Inclusive:** The most effective network boards work to build a culture of trust, candor and respect—none of which is possible without a culture of inclusion. Boards that cultivate an inclusive culture ensure that all board members are encouraged to bring their perspectives, identity and life experience to their board service. An inclusive board culture welcomes and celebrates differences and ensures that all board members are equally engaged and invested, sharing power and responsibility for the Alumni Association's mission and the network board's work.

MANAGING VOLUNTEERS

Managing and retaining volunteers also requires the skills and abilities of a strong leader. To be a successful leader of volunteers, we encourage the following:

- Create an environment where everybody feels welcome, valued and appreciated.
- Engage all volunteer leaders in setting the strategic goals for the group and identifying and executing events.
- Keep your volunteers updated on information you are receiving from the Alumni Association and other volunteers. Share emails and other communications you receive from the Alumni Association. Send bulleted minutes of meetings to volunteers who missed a meeting.

BOARD MEETING AGENDA

For a sample agenda, see **Appendix A**.

POLICIES AND PROCEDURES FOR ALUMNI NETWORK FINANCES

Fully chartered networks will continue to be covered under the Alumni Association's nonprofit 501(c)(3) status. These networks function as independent cost centers responsible for tracking their own revenue and expenses. As part of the management process, networks should establish their own financial accounts at an institution local to the network (your staff liaison will help you in this process, see page 16).

Networks are expected to be self-supporting and operate on a break-even basis. At the midpoint and end of each fiscal year (January 1 and June 30), each network shall provide the Alumni Association copies of their monthly banking statements from the financial institution and an accounting of revenue and expenses for the year. All reports and documents will be sent to your Alumni Association liaison. In addition, networks must report their monthly bank account balance to their staff liaison.

Networks should not carry over more than \$2,000 into a new fiscal year. Funding will not be allocated if the network has an excess of \$2,000. Exceptions can be granted after speaking with your staff liaison.

Approved Use of Network Funds

- Room rental fees, catering or speaker gifts
- Purchasing items to raise money, spending no more than 25% of the network budget. The network must use approved vendors and logos/marks through Alumni Association staff liaison.

OPERATING PROCEDURES

- The fiscal year runs from July 1 to June 30.
- We recommend using a cash record, check record and ledger book/spreadsheet.
- All network expenses and income should be processed through the official network bank account. Network funds should never be kept in a personal bank account.
- A record of revenue and expenses associated with individual events should be kept to allow networks to evaluate the financial success of their events and for future planning. As a matter of good practice, a post-event recap should be documented for future decision-making conversations.
- The Alumni Association reserves the right to require an independent audit if a network fails to comply with financial operating procedures.
- Based on the Alumni Association's annual budget, funding distribution may be subject to change.
- If sufficient funds is not available to cover the costs of a function, the network, not the Alumni Association, are responsible for any shortfall.
- Networks that fail to file the necessary annual financial filings with the Alumni Association will be placed on probation. Networks on probation are ineligible for administrative and financial

- support from the Alumni Association until they come into compliance.
- Networks cannot carry a balance of more than \$2,000 into a new fiscal year.
- Networks must share the monthly bank account balance with their staff liaison.
- Alumni Association staff liaison must be a co-signer on the network bank account.

SUCCESSION PLANNING

One of the most important roles of a volunteer leader is to identify future leaders. This will ensure the long-term success of the group by continuing the great work you have done. A few tips for succession planning:

- Start early and take time to identify new leadership.
- Follow up with alums who attend your events; they are a great group to start with.
- Personally engage with potential leaders. Get to know them and make sure they are a good fit.
- Delegate responsibility to potential leaders so they can develop hands-on knowledge and skills.
- Model effective leadership before leaving your position.
- Offer potential new leaders the opportunity to attend a board meeting before committing to a role on the board.
- Provide the below materials to new leadership in your Google Team Drive:
 - History of organization and organizational chart
 - Bylaws and charter documents
 - Reports on past events and status of any upcoming events
 - List of goals–accomplished and unaccomplished
 - “What I Wish I Had Known” (a list of things that would have been helpful to you as a new leader)
 - Copy of the budget/bank documents
 - Rosters and frequently used numbers, including regularly used venues
 - Alumni Network Volunteer Leaders Handbook

GOOGLE DRIVE/GMAIL

Each network is required to have a Google Drive and Gmail account, which will be set up by the network's Alumni Association's liaison. This account should be used for all official business of the network, including bank accounts and vendor contracts. The Google Drive should be tied to the network's Gmail account, not an individual's email account. Leaders who already have such an account must share the password with their staff liaison. This helps ensure all network leaders and your Alumni Association liaison have access to all appropriate documents.

ALUMNI ASSOCIATION SUPPORT

The UMD Alumni Association is always available to assist networks in their outreach efforts. Below is a list of resources and services available to your network.

RESOURCES FOR A CHARTERED ALUMNI NETWORK

- Funding Eligibility: Please contact your Alumni Association liaison to find out your funding eligibility.
- Insurance:
 - Coverage for your network leaders under the University of Maryland Alumni Association’s Directors & Officers liability policy.
 - Liability coverage up to \$1 million for your events under a separate event policy.
- As a subordinate unit, you share in our federal group tax exemption, allowing you to solicit donations that are tax-deductible to the donor (with some quid pro quo restrictions).
 - See **Appendix E** for a sample donation receipt.
- The Alumni Association completes the annual 990-N required by the IRS for each network with gross revenue of less than \$50K per year.
- Event registration and payment processing is handled through the AlumniIQ platform.
- One free space rental per year at the Samuel Riggs IV Alumni Center. Some restrictions apply. Please contact your staff liaison for details.
- Planning strategy consultation.
- Staff support via your Alumni Association liaison.

SUPPORT SERVICES

The Alumni Association offers the following services to networks. We will:

- Send emails to market all network events.
- Support email marketing for network events.
- Set up registration pages through AlumniIQ.
- Send “event-in-a-box” packages to volunteers.
- Offer funding opportunities for events.
- Provide demographic data about alumni.
- Maintain and update the Alumni Association Alumni Network Handbook.
- Ensure ongoing training for your network leadership.
- Annual Volunteer Leaders Dinner and Awards program.
- Provide an assigned Alumni Association staff advisor.
- Provide Alumni Association-branded items and materials.

Network leaders also receive discounted Alumni Association membership rates:

- Annual Membership: \$25
Join at alumni.umd.edu/staff
- Lifetime Membership: \$650 (single) and \$700 (joint)
Join at alumni.umd.edu/boardpromo

Please note, all network leaders must be a current member of the Alumni Association in order to remain in good standing as a volunteer leader.

SETTING UP NETWORK FINANCES

All chartered networks should have a bank account. Chartered networks without one should meet with their staff liaison to learn how to establish an account. Each network must manage its own account. To set up a bank account:

- Establish an EIN using the Alumni Association federal tax ID number (52-1630673):
 - Use this link to request an EIN/tax ID number online:
<https://sa.www4.irs.gov/modiein/individual/index.jsp>
 - Use the SS-4 form located in **Appendix F** as a guide.
- Once the IRS mails the EIN/tax ID number, send a copy of the notice to your Alumni Association liaison.
- Open a bank account for your network using the new EIN/tax ID number, not the Alumni Association’s tax ID number. The network is responsible for covering any fees associated with the bank account; consider selecting a bank that does not charge a fee.
- Bring a copy of the Alumni Association’s IRS 501(c)(3) determination letter (located in **Appendix G**), in case the bank requests it.
- Give your Alumni Association liaison access to the network’s account by providing him/her with login information for the account to be kept in a secure location.

Note: The treasurer will need to provide their Social Security number when they set up their bank account, per U.S. banking regulations.



PLANNING YOUR EVENTS

Network events support the mission of the Alumni Association by building membership and creating opportunities for alumni to connect with each other. This handbook includes sample documents that will be helpful as you plan events. **Appendix F** offers a step-by-step event planning checklist to help make your event a success.



EVENT IDEAS

Networks hold a variety of events (virtually or in-person) to attract different types of alums. Below is a short list of events held by networks. They can serve as a starting point for new networks.

- **Professional Networking Events**
 - Focused networking events around a particular theme/topic
- **Social Events**
 - UMD game watches, brewery tours, wine tastings, crab feasts, co-hosted events with a Big Ten alumni network, Welcome to Your Neighborhood (targeted toward most recent graduates), trivia, paint night and professional sports outings/games
- **Community Service Events**
 - April is Do Good Service Month for the Alumni Association; we encourage networks to coordinate a service opportunity then.
 - Food drives, stream cleans and tutoring
- **Family-Friendly**
 - Pumpkin patch visits, picnics and zoo outings
- **Cultural**
 - Museum tours, plays and concerts

FUNDRAISING POLICY

Networks can only fundraise for the Alumni Association, their network or an organization/group at the University of Maryland. Networks can not fundraise for any organizations/groups outside of the University of Maryland or the University of Maryland Alumni Association. According to MarylandnonprofitAssociationrulesyouareunableto raise money for other organizations. However, while unable to raise funds for an outside organization, groups may collect goods for an organization of their choosing. Networks are responsible for providing receipts to any donors. Please see **Appendix H**: Sample Cash Donation Receipt for more information. Examples of causes you can fundraise for include:

- Launch UMD
- Giving Day
- Scholarship Fund
- Giving Tuesday



EVENT MARKETING

- **Emails:** The Alumni Association will market all network events and Alumni Association-sponsored events to local alums through event digest emails.
 - To ensure network-planned events are included in the event digests, please send all event details to your Alumni Association liaison. Contact your advisor for specific deadlines/requirements for your network.
 - **Social Media:** Use your network's social media pages to promote the events. Please use the approved social media graphics on your network pages.
 - **Personal Outreach:** Call or email local alums using information provided by the Alumni Association liaison to encourage them to attend events.
- For additional marketing guidance and resources refer to **Appendix C**.



EVENT REGISTRATION

- Process all event registrations through the Alumni Association's website (by an Alumni Association staff member) to ensure accurate data collection.
- Your Alumni Association liaison will provide you with an attendance list prior to the event and upload it to your team drive, or he/she will provide a temporary access code for AlumnIQ on site check-in.



EVENT ATTENDANCE

- Track attendance using AlumnIQ or the QR code for walk ups.



EVENT FOLLOW-UP

- Follow-up is an important component of event planning. Think of your event as the starting point to developing relationships within your network. We advise the following actions once your event is complete:
- One week after the event, send the attendee list to your Alumni Association liaison to ensure accurate data collection.
 - For virtual events, download the registration report and send it to your Alumni Association liaison within 24 hours of the event's conclusion.
 - Reach out to potential volunteers and encourage them to attend a future board meeting or event.

EVENTS WITH ALCOHOL AND LIQUOR LIABILITY

While the consumption of alcohol may be an appropriate aspect of certain network events, drinking should never be the primary purpose of a network event. For example:

- The primary purpose of happy hours may be professional and/or social networking with other alumni.
- The primary purpose of brewery/winery tours may be learning about how the product is made and served and the location’s history.
- The primary purpose of game-watching parties may be athletics, camaraderie and networking.

The Alumni Association’s liability insurance will not cover events where consumption of alcohol is the exclusive or primary activity (e.g., bar/pub crawls), thereby exposing a network and its volunteers to potential personal liability or injuries that may happen at these events. Because of the risk involved and the negative reflection upon the Alumni Association’s brand and image, the association prohibits its networks from organizing or promoting these events. Hosting such an event may also jeopardize a network’s status with the Alumni Association.

Do **not** serve alcoholic beverages at a network event in a facility that does not itself have a liquor license or permit. Additionally, do not hire a caterer or bartender without the required liquor license or permit. **Never charge for alcohol** (i.e., host a cash bar) unless you are absolutely certain your caterer or bartender has a valid liquor license or permit as required by your state. There is no coverage if any required license is not in effect.

If you are hosting a network event in a private home where alcohol is served, the Alumni Association strongly recommends you hire a licensed bartender or caterer with liability insurance to serve the alcohol (otherwise, the host’s homeowner’s insurance policy will be the primary insurance coverage). The Alumni Association’s liability insurance does not cover events held in non-public places.

Network leaders should take appropriate intervention measures if a guest at any network event appears intoxicated.

The Alumni Association’s workers compensation policy does not extend coverage to volunteers.

INCORPORATING A MEMBERSHIP MESSAGE

- **Make a plan:** Work with your Alumni Association liaison to determine how to best communicate to alums about membership opportunities.
- **Make the ask:** Invite event attendees to become members, both in a group setting and one-on-one when appropriate. Make membership brochures available at every event, and mention membership when attendees check in and during any presentation or remarks.
- **Show the benefits:** In addition to speaking about the benefits of membership, always offer a member discounted price for event admission tickets. Make sure this discount is reflected in your financial strategy.

WHAT TO SAY TO ALUMS WHO ASK: “WHY SHOULD I JOIN?”

- No matter where you go in the world, membership keeps you connected. Near or far, you are always a Terp!
- The UMD Alumni Association establishes lifelong traditions, pride and connections so students of yesterday, today and tomorrow can do what matters most to them.
- Membership helps you stay active with discounted pricing at network events in your local area, career webinars, social events, happy hours, member-only exclusive events and more.
- Membership keeps you connected with UMD and fellow Terps, which opens doors to professional and personal development. You also get access to mentorship opportunities through Terrapins Connect.
- Membership helps you stay informed through *Inside the Shell* e-newsletters, *Terp* magazine and email updates.
- Membership grants you access to Terp Deals, giving you discounts on popular restaurants, retailers and more across the nation.
- An investment in the Alumni Association is an investment in your alma mater, which ultimately increases the value of your own degree. Membership is 100% tax-deductible and is counted as a gift to the university.
- Membership dues support programming that keeps alums connected with Maryland, while providing opportunities to current students such as the Maryland Alumni Association scholarship program.
- Best of all, joining the Alumni Association is a leadership opportunity. You came to UMD to learn, but you join the Alumni Association to lead.

For a full and up-to-date list of benefits, please visit alumni.umd.edu/Join#Benefits.

MEMBERSHIP TYPES AND PRICING

ALUMS & FRIENDS

Membership is open to all Maryland graduates, friends, fans and family members.

| | |
|--|-------|
| Annual Single auto-dues (automatically renews annually with valid credit card) | \$55 |
| Annual Joint (automatically renews annually with valid credit card) | \$70 |
| Three-year Single | \$125 |
| Three-year Joint | \$175 |
| Lifetime Single* (lifetime membership, plus a gift and license plate frame) | \$850 |
| Lifetime Joint* (lifetime membership, plus a gift and license plate frame) | \$950 |

NEW GRADS

Our most recent graduates receive reduced pricing for Alumni Association membership for one year after their graduation date.

| | |
|---|-------|
| GradPak Annual (annual membership, plus a gift) | \$25 |
| GradPak Life* (10-month installment plan available) | \$300 |
| GradPak Life Joint* (10-month installment plan available) | \$375 |
| GradPak Legacy* (life membership, plus a legacy brick; 10-month installment plan available) | \$450 |

*In addition to the gifts outlined above, lifetime membership includes having your name(s) engraved on the Frann G. & Eric S. Francis Lifetime Member Wall.

Member pricing as of September 2023.

OTHER GIVING OPPORTUNITIES

UNIVERSITY OF MARYLAND ALUMNI ASSOCIATION FUNDS

A gift to one of our funds supports life-changing programming and initiatives designed to help Terps become the best version of themselves. For more information and to donate, please visit: go.umd.edu/alumnifunds.

Alumnae Outreach and Engagement Fund

Description: Supports initiatives that elevate and educate women-identifying Terps, and those who support women-identifying Terps

Funding Examples: Alumnae leadership summit, Women’s History Month programming, alumnae-student mentoring program, etc.

Alumni Association Diversity, Equity and Inclusion Fund

Description: Supports programming that is equitable and inclusive for alums of all identities, backgrounds and experiences

Funding Examples: Alumni diversity, equity and inclusion training and workshops, speaker events, etc.

Alumni Association Programs and Events Fund

Description: Supports events and initiatives that bring together the 414,000-strong Terp alumni network to enhance their personal and professional lives

Funding Examples: Any alumni engagement and outreach program including the Homecoming tailgate, networking events, regional programs, alumni career services, etc.

Alumni Association Student Engagement Fund

Description: Supports programs that connect students with the global alumni network, ensure Terp traditions are passed on to the next generation and develop future leaders

Funding Examples: M Book, student outreach events, and student professional and leadership development

Alumni Association Student Scholarship Program Fund

Description: Supports high-achieving students who show commitment to the university through campus involvement and who exhibit Terp pride

Funding Examples: Annual Alumni Association student scholarship awards

Alumni Entrepreneurship Fund

Description: Supports Alumni Association initiatives and events that connect Terps with entrepreneurs and entrepreneurship opportunities

Funding Examples: Terp Entrepreneur Network events, alumni business directory, etc.

Black Alumni Outreach and Engagement Fund

Description: Supports initiatives that reconnect Black alums with one another and the university

Funding Examples: Black Alumni Weekend, University of Maryland Black Alumni Network events and programs, etc.

Samuel Riggs IV Alumni Center Fund

Description: Supports maintenance and enhancements at the home for alumni on campus

Funding Examples: Improvements for Dessie M. Moxley Garden, conference and presentation rooms

NAMING OPPORTUNITIES

Individuals looking to leave a legacy can make a gift in support of a named physical entity at the Samuel Riggs IV Alumni Center. Visit alumni.umd.edu/namedgifts for a list of current opportunities.



LEGACY BRICK CAMPAIGN

More than 150 years ago, the founders of the University of Maryland laid the foundation for this great institution, brick by brick. Just as they built a world-class institution that continues to support and inspire decades later, you can continue this legacy of greatness by purchasing your own paver or brick today.

- Commemorate commencements, reunions and other Maryland milestones
- Etch your name into the history of your alma mater
- Memorialize a treasured individual, campus organization, fraternity or sorority
- Declare your devotion to a Terrapin team, club or network

alumni.umd.edu/brick

UNIVERSITY OF MARYLAND GIVING DAY

Giving Day is a one-day fundraising event for all members of the University of Maryland community. Students, faculty, staff, parents, friends and alums are all welcome to participate. The goal is to raise critical funding and engage our community to advance the University of Maryland’s mission. Make a gift in support of your favorite school, college or program. The University of Maryland accepts gifts of \$10 or more during Giving Day.

VOLUNTEER EXPECTATIONS FOR CHARTERED NETWORKS

Board Involvement

The success of a chartered network depends on the participation of its board. Board members:

- Must attend at least 75% of all network board meetings.
- Must attend at least 50% of all network planned events.
- Must actively contribute to board activities and take a leadership role in at least one event per year.
- All events must be marketed through the Alumni Association marketing channels. All attendee lists must be shared with staff liaison upon completion of event.

Alumni Association Membership

- Each alumni network leader must be a member of the Alumni Association.
- Alumni network leaders should promote the benefits of membership at events and in conversations with fellow Terps.

Term Limits

- The term of office for each alumni network leader shall be limited to a two-year term.
- Members shall not serve more than three consecutive terms, not including role of immediate past president.

Alumni Association Agreement

I agree to operate in accordance of the mission, vision and bylaws of the University of Maryland Alumni Association and embrace my role as a representative of UMD and the Alumni Association. As a University of Maryland alumni network leader, I agree to receive direction from the University of Maryland Alumni Association and their designees.

Confidentiality Statement and Acknowledgement

By accepting this volunteer role, I agree to abide by the University of Maryland’s and the University of Maryland Alumni Association’s confidentiality policy. Any information received to support this volunteer role, including but not limited to, constituent contact information, giving information and/or involvement information, is for use only to support the above mentioned responsibilities. Use of the information for any other purpose, including but not limited to, reproducing and storing in a retrieval system by any means, electronic or mechanical, photocopying, or using the information contained in the documents for any private, commercial, religious and/or political activity is strictly prohibited. Such acts are in direct violation of the policy and constitute misappropriation of property and may result in immediate removal from the board.

- After one month, a distributed list should be considered expired.
- Lists are to be used for individual, personalized outreach–no mass emails or solicitations.

I certify that my signature below indicates that I have read this document and the University of Maryland Policy on the Acceptable Use of Information Technology Resources in its entirety and agree to abide by the expectations listed within.

| | | |
|------|-----------|------|
| Name | Signature | Date |
|------|-----------|------|

NON-DISCRIMINATION POLICY

I. PRACTICE OF NON-DISCRIMINATION

The University of Maryland Alumni Association (the “Association”) is an equal opportunity organization and shall not discriminate on the basis of race, color, national or ethnic origin, religion, sex (including pregnancy, childbirth, and related medical conditions), age, disability, citizenship status, familial status, military status, sexual orientation, gender identity and expression, or genetic information in the administration of its programs and facilities, including admission and access to, and treatment and employment in, its programs and facilities. The Association affirms that it is committed to providing an inclusive and welcoming environment for all persons.

II. NON-DISCRIMINATION PROCEDURES

Every program, event and facility operated by the Association, now or in the future, shall abide by this Non-Discrimination Policy.

Harassment, interference, coercion, or intimidation of a director, officer, employee, volunteer, recipient of services, or vendor based on any of the above criteria is specifically prohibited. Harassment and intimidation includes abusive, foul, or threatening language or behavior.

All qualified individuals with a disability are entitled to a reasonable accommodation or modifications to the Association’s programs and facilities that will permit the individual an equal opportunity to use and enjoy the Association’s programs and facilities. Requests for exceptions to the Association’s rules, policies, practices, services, or programs, or structural modifications to the Association’s facilities should be made to the Executive Director.

Issues of discriminatory treatment, harassment, interference, coercion, or intimidation based on any of the above criteria should immediately be reported to the Executive Director, or if such issue involves the Executive Director, then to the President of the Board of Governors. After appropriate investigation made in consultation with the Association’s legal counsel, if substantiated, prompt action will be taken to remedy the issues. Retaliation against individuals who report in good faith genuine concerns or complaints of wrongdoing or who are involved in the investigation of such concerns or complaints is prohibited.

Violations of this Non-Discrimination Policy may be grounds for removal from office, may lead to disciplinary action, up to and including termination of employment, and may have other legal consequences.

CODE OF CONDUCT

I. PURPOSE OF CODE OF CONDUCT

The University of Maryland Alumni Association (the “Association”) is committed to providing an inclusive and welcoming environment for all persons. The directors, officers, employees, and volunteers represent the Association while participating in Association programs and events. The purpose of this Code of Conduct is to ensure that every director, officer, employee, network leader and volunteer understands and adheres to the highest standards of conduct so that their actions never damage the Association’s reputation for integrity.

This Code of Conduct does not attempt to address every situation that may be encountered and is not a substitute for an individual’s responsibility for exercising good judgment and common sense, but sets forth basic expectations concerning professional and personal behavior. If an individual is ever unsure about how to apply this Code of Conduct to a particular situation, that individual should ask an Association officer or any member of the Board.

II. RESPONSIBILITIES

Appropriate Behavior

All governors, officers, employees, network leaders and volunteers are expected to:

- Refer to and abide by the Bylaws and Policies of the Association;
- Act honestly, fairly, ethically, and with integrity in their actions on behalf of the Association and their interactions with each other;
- Behave in a professional, respectful, and courteous manner that does not reflect adversely on their service on behalf of the Association;
- Avoid accepting gifts from vendors
- Report any concerns or complaints of violations of association policies to the Executive Director, or if the report involves the Executive Director, then to the President of the Board of Governors; and
- Promote compliance and ethics by example.

Any of the following behaviors may be deemed a violation of this Code of Conduct:

- Willful or repeated violation of established Association policies, procedures, and rules;
- Conduct that is inconsistent with the goals and objectives of the Association, including but not limited to, unlawful harassment or discrimination;
- Use of a position with the Association for a purpose that is or gives the appearance of being motivated by the desire for private gain or advantage;
- Disclosure of any confidential or proprietary information, unless authorized by the Executive Director of the Association or his/her designee.
- Use, distribution, transfer, sale, purchase, attempts to sell or purchase, transport, or possession of illegal drugs, weapons, explosives, or other dangerous or unauthorized materials during Association events or working hours, on the Association’s premises, or while doing Association business;
- Damaging, destroying, or wasting property of the Association or another participant in any Association program or event;
- Theft, corruption, bribery, blackmail, extortion, fraud, embezzlement, espionage, or dishonesty of any kind;
- Threatened or actual physical violence; and
- Being the subject of material media coverage for allegations of offenses involving moral turpitude.

Alcohol

The use or possession of alcoholic beverages by individuals under the age of 21 (or the age of majority in the jurisdiction) or providing or distributing alcohol to underage individuals is prohibited.

Social Media

If any governor, officer, employee, network volunteer or volunteer participates in social media for personal purposes, each such individual shall carefully differentiate between personal opinions and statements made on behalf of the Association. Volunteers and employees shall not make statements on behalf of the Association without prior authorization. All individuals who are subject to this Code of Conduct shall use good judgment about what to post and what not to post, with the understanding that even their personal posts may be widely accessible to the public and may reflect on the Association. They shall not make any posts about the Association, its governors, officers, employees or volunteers, or any Association activity that are misleading or false. All individuals subject to this Code of Conduct are asked to bring Association-related complaints or issues to the attention of an appropriate person at the Association before publishing such complaint or issue to social media.

Confidential Information

The Association considers the records that it maintains on alumni, donors, parents, students, and friends of the University to be highly confidential. Certain information maintained by the Association may also be subject to the Family Educational Rights and Privacy Act (FERPA) or other protections. Financial information, such as the association’s budget, corporate sponsorship revenues and royalty agreements are also considered confidential. As a result, any information gained while volunteering for the Association, including information gained through conversations, is confidential and may only be used for legitimate purposes of the Association. Any such information shall not be shared with anyone outside the Association without prior authorization.

III. COMPLIANCE WITH POLICIES

The Association requires every governor, officer, employee, network leader and volunteer to read and comply with this Code of Conduct, the Association’s Non-Discrimination Policy, and the Association’s Conflict of Interest Policy in order to participate in any program operated by the Association, including but not limited to alumni events sponsored by the Association. Respecting the principles and complying with these policies is a condition of each individual’s participation in Association programs. Any violation of this Code of Conduct may result in disciplinary action, up to and including termination of employment or the volunteer role, and removal from Association programs on a limited or indefinite basis. Each situation will be considered in light of a variety of factors, including the seriousness of the situation, the individual’s employment or volunteer history, performance record, and any prior incidents. The Association reserves the right to act as it believes that the facts and circumstances dictate.

| | | |
|------|-----------|------|
| Name | Signature | Date |
|------|-----------|------|

APPENDICES

APPENDIX A: SAMPLE MEETING AGENDA

XX Alumni Network Board Meeting Agenda
Monday, December 5, 2017 - 6 p.m.
Samuel Riggs IV Alumni Center, University of Maryland, College Park, MD

- Roll Call and Introductions (All)
- Approve Previous Meeting Minutes (President/All)
- Alumni Association Updates (Alumni Association Staff or President)
- Finance Update (Treasurer)
- Past Events Debrief (Event Lead(s))
- New Business
 - Budget Review/Approval (Executive Committee)
 - Upcoming Events
 - Other
- Next Steps (President)
- Closing (President)

12 WEEKS BEFORE THE EVENT

- Confirm the event date with your Alumni Association advisor and set an RSVP date.
- Outline the event program including objectives, guest speaker, etc.
- Assign responsibilities to fellow board members.
- Establish event budget including: facility rental, food, decorations, printed materials, A/V equipment, door prizes, gratuities, etc.
- Calculate per-person event costs.

10 WEEKS BEFORE THE EVENT

- Select and reserve location. Things to consider:
 - Is there convenient and adequate parking, or is it close to public transit?
 - Is the room size appropriate for the crowd?
 - Is the noise level too loud to have a speaker?
- Reserve A/V equipment, if needed.
- Set menu and arrange for bar service, if appropriate.

EIGHT WEEKS BEFORE THE EVENT

- Determine staffing needs for event, i.e. someone to manage on-site registration and check-in.
 - Recruit board members to staff the event.
- Send all necessary event details to your Alumni Association liaison.

SIX WEEKS BEFORE THE EVENT

- Contact your Alumni Association liaison if you need decorations, small giveaways, Alumni Association membership applications, etc.
- First email will go out advertising the event.

THREE WEEKS BEFORE THE EVENT

- Second email will go out advertising the event.

ONE WEEK BEFORE THE EVENT

- Prepare registration materials and name tags.
- Provide a final count to facility managers and caterers.
- Last email will go out advertising the event.

THREE DAYS BEFORE THE EVENT

- Request an attendees list (Google Sheet) from Alumni Association liaison and use it to track attendance at the event.

DAY OF THE EVENT

- Arrive one to two hours prior to the event to make sure facility is arranged properly.
- Check in and greet guests. Make sure to capture accurate attendance on the Google Sheet.

FOLLOWING THE EVENT

- One week after the event, send the attendee list to your Alumni Association liaison.
- Within two weeks, follow up with any interested alumni and encourage them to get involved with the board.

LOGO USAGE GUIDELINES

The University of Maryland Office of Marketing and Communications will provide you with a logo for your network that aligns with the university's branding. To request a logo, contact your staff liaison.

When including a university logo, name or mark (including but not limited to: University of Maryland, Terps, Terrapins, UMD, Testudo Maryland, design marks such as Mbar, Seal, Flag Globe, Mascot mark, Terrafont etc) in any of your communications, you must abide by the following university policies, as outlined by the Office of Trademarks and Licensing (a division of the Office of Marketing and Communications):

- No university marks or names may be used in any manner that suggests or implies university endorsement of products, services, political parties or views, or religious organizations or beliefs.
- The use of a logo in conjunction with an alcohol logo or alcohol paraphernalia is prohibited. The university does not permit its marks and names to appear on the branding, labeling and/or marketing of alcoholic beverages unless approved by the president.
- The university will not approve the use of its marks or names in connection with any inherently dangerous products (firearms, explosives), illegal drugs, tobacco, gambling, sexually suggestive products or language, or any health-related product.
- University logos and marks cannot be redrawn, re-proportioned, embellished or modified in any way. This includes all mascot marks (Testudo). Mascot marks are not allowed to be altered, including but not limited to: altering its face, putting clothes on the marks, changing the M on the chest, etc.
- The Maryland Terrapins are the athletic teams of the university, and the Terp mascot logo and Terrafont word marks are an important component of the university brand. Use them only when sharing messages related to the Department of Intercollegiate Athletics (ICA). The primary user of these marks is the ICA, but occasional use by units working with alumni and other groups is permitted. These marks, names and logos are licensed to selected vendors for use in retail products such as apparel, gifts and other merchandise. No alterations of these graphics are permitted.

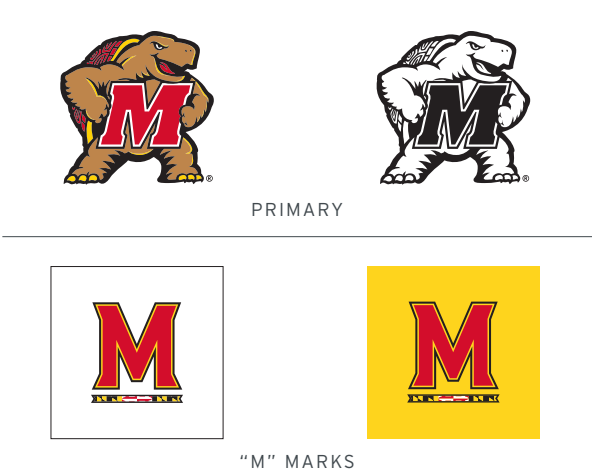
Please visit trademarks.umd.edu for a full list of logos and brand guidelines.

ALUMNI ASSOCIATION LOGOS



ATHLETICS MARKS

(May be used occasionally, per guidelines above)







ALUMNI NETWORKS

Alumni networks are required to use the following two standard formats to create consistency among the University of Maryland’s many alumni networks. Alumni networks can create a secondary design(s) as long as they do not incorporate any University of Maryland logos into their secondary design and they have the official Alumni Association or network logo somewhere present on their material. The secondary design(s) must be approved by the Office of Trademarks and Licensing.

Please email all questions regarding designs or use of logos to licensing@umd.edu.

OFFICIAL MARKS

| | |
|--|--|
|  PHILLY ALUMNI NETWORK |  WASHINGTON, D.C. ALUMNI NETWORK |
|  |  |

ACCEPTED USE OF MARKS

The following design examples were approved by the Office of Trademarks and Licensing and merchandise was produced by a licensed vendor. All merchandise, even products just using the official network’s logo on it, must be produced by a licensed vendor. For more information about our licensed vendors, please visit trademarks.umd.edu.



This piece of merchandise correctly uses the alumni network’s official logo. This one-color logo is allowed—and one-color logos save money.

The tablecloth features the official network logo using the appropriate combination of university colors and proportions.



For these T-shirts, each network created its own design to represent their network in a more unique way. These designs were approved by the Office of Trademarks and Licensing. They both use an appropriate font and university colors, and include the network’s official logo as a second mark on the shirt sleeve.



In this example the network’s official logo is being utilized in a creative way, but has not been altered. There is space between the skyline design and the official logo, and the skyline design is not touching or obscuring the official logo in any way. In addition, official university colors are being used.

PROHIBITED USES OF MARKS

The following examples are not permissible for use, and were not approved by the Office of Trademarks and Licensing.



This design uses an altered version of the Terrafont Bar mark by having the word Chicago above the bar, and the word Terps below the bar. The proportions and outlines have also been altered. Terrafont Bar marks should always appear with the word “Maryland”, “Terps” or “Terrapins” above the bar, and they cannot be altered or changed in any way.



The design of this hat was not approved, as it does not include either of the network’s official logos anywhere on the merchandise. If the official logo was included on the hat, the design would have been approved.

This graphic is not permitted as it is altering one of the official network logos as provided by the Office of Marketing and Communications. The text used below the bar (Montgomery County Alumni Network) is also out of proportion and not in an approved font.



SOCIAL MEDIA GUIDELINES

Alumni Association Hashtag:

#STAYFEARLESSUMD

Alumni Association Accounts:

@TerpAlumni

@Maryland_Alumni

@Maryland_Alumni

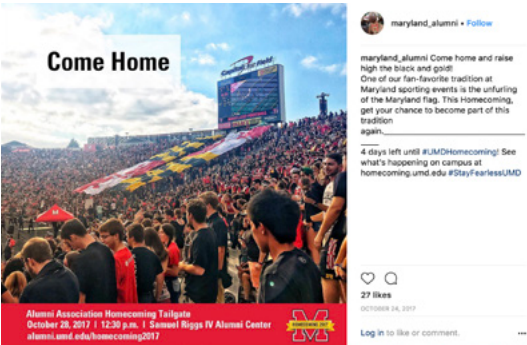
Sample posts:



SAMPLE TWEET



SAMPLE FACEBOOK POST
(LIVE VIDEO FROM EVENT)

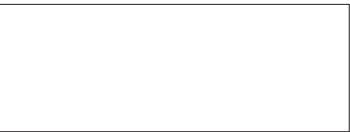


SAMPLE INSTAGRAM
(EVENT AD)

University Colors:



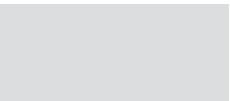
UMD YELLOW
PMS 116
RGB 255 210 0
CMYK 0 16 100 0



WHITE
RGB 255 255 255
CMYK 0 0 0 0



UMD RED
PMD 186
RGB 227 25 51
CMYK 0 100 84 4



GRAY 1
RGB 220 221 222
CMYK 0 0 0 15



GRAY 2
RGB 138 146 152
CMYK 5 0 0 50



GRAY 3
RGB 67 74 79
CMYK 10 0 0 85



BLACK
RGB 18 27 33
CMYK 20 0 0 100

MARKETING AND COMMUNICATIONS RESOURCES

- omc.umd.edu/resources
Guidelines for maintaining the university's brand, including fonts, general branding guidelines, web guidelines, university facts and more.
- brand.umd.edu
The UMD Brand Toolkit contains all the guidelines and resources you need to ensure appropriate, professional and effective communications for the university.
- brand.umd.edu/editorial.html
Editorial guidelines are based on Associated Press style and include the university's practices on writing academic degrees, class years, dates and other relevant issues.

GENERAL / EVENT MARKETING PROCESS

1. Flesh out event details (determine who, what, when, where and why).
2. Choose how you want to market your event:
 - a. Social media
 - b. Regional/affinity digest emails
 - c. Network standalone emails
 - d. Personal outreach/word of mouth
3. Design your graphics (according to the outlets you want to market).
4. Ask your staff liaison to create a registration page on the Association website and to add your event to the events calendar .
5. Create your communication timeline.
6. PROMOTE!

EMAIL GUIDANCE

- The following will help you when building your emails in AlumnIQ.
- Padding
 - 35 Left/Right, 35 Top, 20 Bottom.
 - Decrease Left/Right Padding to 15 for anything over one column (ex. A row with two photos side by side).
 - Images/Graphics
 - Square graphics for columns, horizontal graphics for one-column email design.
 - Be mindful of text on graphics. Images will be smaller (especially on mobile) so might be illegible (see Graphics for more tips).
 - Alt-Text: Apply alt-text to all photos and graphics. Alt-text can be found by selecting a graphic in your email and navigating to the right-hand menu. Alt-text should be a short description of what is in the photo/graphic. If you are using a text-only graphic, simply type in the words on the graphic.
 - Please link all graphics/images to their correct landing page destinations. Links are found below alt-text.
 - Naming Emails
 - AA EO | [Name of Email] | [Date of Send]
 - Add plain text (all copy and links in plain text section)

GRAPHIC DESIGN

The Alumni Association has an account with **Canva**, an online graphic design platform that can assist you in creating designed graphics, flyers, presentations etc. Contact your staff liaison for account access. When logged in, you will have all university colors and fonts uploaded to use.

Design tips:

- Less text is preferred on graphics (due to accessibility issues).
- Contrasting colors make it more legible.
- For social media graphics, include logos.

PHOTOGRAPHY

The University of Maryland uses high-quality photography, with crisp, vivid color, excellent composition and memorable images that showcase the beauty of the campus, the variety of academic opportunities and resources, its classical architecture, the diversity of its students and faculty, campus life, sports and the arts.

Photo tips:

- Use photos that are appropriate and represent the Association and the university.
- Always receive permission to use someone’s likeness.
- Use real-life photos rather than stock images if possible.

Do not use unauthorized photos for promotions without permission, including those found using Google.

Acceptable photos include:

- UMD photos
<https://universityofmaryland.zenfolio.com/>
- Alumni Association’s Flickr account:
<https://www.flickr.com/photos/marylandalumniassociation/albums>
- Royalty-free stock images
<https://unsplash.com/>

SOCIAL MEDIA

When using social media outlets to promote your events and activities, it is best to plan ahead, and consider the following for each of your posts:

- Who is this event for and who should we be targeting?
- What graphics would be best to highlight this event?
- How can we show the benefits of this event?
- What are the basic event information that should be included (date, time, etc.)?
- How often will we post about this event (once a week, two times a week, etc.)?

When crafting your social media posts:

- Always use a graphic when available.
- Add alt-text to your post to make it accessible
- Tag hosts and speaker from your event in your posts.
- Add a call to action (ex. Register, Join Now, etc.) and a link.
- Frame your copy to indicate why prospective guests should attend your event. For example: Will it help them advance their careers? Is there a price to attend?

SAMPLE - If acknowledging a donated item, do not include “Amount.” This is for the donor to determine.

Date

Donor Name

Donor Business

Address

City, State Zip

Dear Donor Name:

Thank you for your generous gift to the [Network Name]. Your support of the [Network Name] demonstrates the high value you place on our mission to support and promote the University of Maryland, and helps ensure our continued success.

Our records reflect the following terms of your donation:

Date made: Month Day Year

Items Donated: Donation Detail

OR:

Amount: \$X

Benefits Received: None [or describe & value, i.e. “2 admission tickets valued at \$60”]

The IRS requires us to inform you that the full amount of your donation is tax-deductible for federal income tax purposes and is limited to the excess of the amount of any money (and the value of any property other than money) contributed by you over the value of the goods and services provided by the [Network Name] (Tax ID#) to you. Please keep this receipt with your tax records.

Again, thank you for enhancing the quality of the [Network Name].

With Best Wishes,

Name

Title

Form **SS-4**
(Rev. January 2009)
Department of the Treasury
Internal Revenue Service

Application for Employer Identification Number
(For use by employers, corporations, partnerships, trusts, estates, churches, government agencies, Indian tribal entities, certain individuals, and others.)
▶ See separate instructions for each line. ▶ Keep a copy for your records.

OMB No. 1545-0003
EIN

| | | | |
|--|--|---|--|
| Type or print clearly. | 1 Legal name of entity (or individual) for whom the EIN is being requested | | |
| | 2 Trade name of business (if different from name on line 1) | 3 Executor, administrator, trustee, "care of" name | |
| | 4a Mailing address (room, apt., suite no. and street, or P.O. box) | 5a Street address (if different) (Do not enter a P.O. box.) | |
| | 4b City, state, and ZIP code (if foreign, see instructions) | 5b City, state, and ZIP code (if foreign, see instructions) | |
| | 6 County and state where principal business is located | | |
| | 7a Name of principal officer, general partner, grantor, owner, or trustor | 7b SSN, ITIN, or EIN | |
| | 8a Is this application for a limited liability company (LLC) (or a foreign equivalent)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | 8b If 8a is "Yes," enter the number of LLC members ▶ | |
| 8c If 8a is "Yes," was the LLC organized in the United States? <input type="checkbox"/> Yes <input type="checkbox"/> No | | | |
| 9a Type of entity (check only one box). Caution. If 8a is "Yes," see the instructions for the correct box to check. | | | |
| <div><div><input type="checkbox"/> Sole proprietor (SSN) _____</div><div><input type="checkbox"/> Partnership</div><div><input type="checkbox"/> Corporation (enter form number to be filed) ▶ _____</div><div><input type="checkbox"/> Personal service corporation</div><div><input type="checkbox"/> Church or church-controlled organization</div><div><input checked="" type="checkbox"/> Other nonprofit organization (specify) ▶ alumni club - 501(c)(3)</div><div><input type="checkbox"/> Other (specify) ▶ _____</div></div> <div><div><input type="checkbox"/> Estate (SSN of decedent) _____</div><div><input type="checkbox"/> Plan administrator (TIN) _____</div><div><input type="checkbox"/> Trust (TIN of grantor) _____</div><div><input type="checkbox"/> National Guard <input type="checkbox"/> State/local government</div><div><input type="checkbox"/> Farmers' cooperative <input type="checkbox"/> Federal government/military</div><div><input type="checkbox"/> REMIC <input type="checkbox"/> Indian tribal governments/enterprises</div><div>Group Exemption Number (GEN) if any ▶ 3490</div></div> | | | |

For Privacy Act and Paperwork Reduction Act Notice, see separate instructions.

Cat. No. 16055N

Form **SS-4** (Rev. 1-2009)

P. O. Box 2508
Cincinnati, OH 45201

Date: July 14, 2001

Person to Contact:
Ms. Dalton 31-07425
Customer Service Representative
Toll Free Telephone Number:
8:00 a.m. to 9:30 p.m. EST
877-829-5500
Fax Number:
513-263-3756
Employer Identification Number:
52-1630673

University of Maryland
Alumni Association
Rossborough Inn
College Park, MD 20742-5425

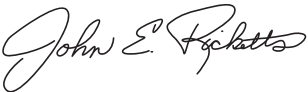
Dear Madam:

We have received your request for a copy of your organization's exemption application and letter of determination.

We were unable to locate these documents. However, we can affirm that your organization received exempt status in June 1999 and is currently exempt under section 501(c)(3) of the Internal Revenue Code. Because your organization will not be able to provide a copy of its application on request, it should keep a copy of this letter in its permanent records.

If your organization filed for exemption after July 15, 1987, or had a copy of the application on July 15, 1987, it is required to make available for public inspection a copy of its exemption application, any supporting documents, and the exemption letter to any individual who requests such documents in person or in writing. The law also requires you to make your organization's annual return (if you are required to file one) available for public inspection for three years after the due date of the return. You can charge only a reasonable fee for reproduction and actual postage costs for the copied materials. The law does not require you to provide copies of public inspection documents that are widely available, such as by posting them on the Internet (World Wide Web). You may be liable for a penalty of \$20 a day for each day you do not make these documents available for public inspection (up to a maximum of \$10,000 in the case of an annual return).

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely,

John E. Ricketts, Director, TE/GE
Customer Account Services

Form **W-9**
(Rev. November 2017)
Department of the Treasury
Internal Revenue Service

**Request for Taxpayer
Identification Number and Certification**

Give Form to the
requester. Do not
send to the IRS.

► Go to www.irs.gov/FormW9 for instructions and the latest information.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.
University of Maryland Alumni Association, Inc

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.
☐ Individual/sole proprietor or single-member LLC
☐ C Corporation
☐ S Corporation
☐ Partnership
☐ Trust/estate
☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ►
Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.
☒ Other (see instructions) ► **501(c)(3) Non-Profit Corporation**

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):
Exempt payee code (if any) _____
Exemption from FATCA reporting code (if any) _____
(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.
Samuel Riggs IV Alumni Center

6 City, state, and ZIP code
College Park, MD 20742

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)
Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.
Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number
- -
or
Employer identification number
5 2 - 1 6 3 0 6 7 3

Part II Certification
Under penalties of perjury, I certify that:
1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.
Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here
Signature of U.S. person ► *Peter McCune, CEO*
Date ► *11/6/2018*

General Instructions
Section references are to the Internal Revenue Code unless otherwise noted.
Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.
Purpose of Form
An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.
• Form 1099-DIV (dividends, including those from stocks or mutual funds)
• Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
• Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
• Form 1099-S (proceeds from real estate transactions)
• Form 1099-K (merchant card and third party network transactions)
• Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
• Form 1099-C (canceled debt)
• Form 1099-A (acquisition or abandonment of secured property)
Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.
If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

Cat. No. 10231X
Form **W-9** (Rev. 11-2017)

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