



usc Alumni  
ASSOCIATION

# ALUMNI CLUB HANDBOOK

2011-2012





Dear USC Alumni Club Leader,

Thank you for the work you have done and will continue to do in establishing a strong Alumni Club presence in your region. Your involvement in the Alumni Club program is an essential link between the mission and goals of the university and the USC Alumni Association with the Trojan Family — the current USC student population, the more than 300,000 alumni worldwide and friends.

Please use this handbook as your principal resource for club operations. It includes information on such topics as the mission and purpose of Alumni Clubs, the responsibilities of club leaders, and how the USC Alumni Association can help you achieve your goals. In addition to this handbook, please review the resources available to you on the USC Alumni Association's Alumni Handbook website (<http://alumni.usc.edu/clubhandbook>) and other tools indicated within this guide.

Thank you again for your passion, enthusiasm and dedication to the Trojan Family. Your commitment to engaging our alumni community is invaluable to the advancement of USC.

Fight On!

Scott M. Mory, Esq.  
CEO, USC Alumni Association

# USC Alumni Club Handbook

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Additional information, USCAA policies and a PDF version of the Alumni Club Handbook are available at <http://alumni.usc.edu/clubhandbook>.



**WELCOME**

## **Overview of the USC Alumni Association**

The USC Alumni Association's mission is to support the overall advancement of the University of Southern California by engaging all alumni for life, building a culture of philanthropy among the Trojan Family, and being the representative voice for all USC alumni.

With more than 300,000 members worldwide, the USC Alumni Association (USCAA) supports more than 100 affiliated alumni clubs, alumnae support groups and multicultural and generational alumni communities. These groups collectively distribute more than two million dollars each year in scholarships for USC students. The USCAA annually hosts hundreds of events and programs around the world, and provides benefits and services to all USC alumni.

### **Scott M. Mory, Associate Senior Vice President and CEO, USC Alumni Association**



Scott Mory joined USC in August 2007. As associate senior vice president, he is responsible for advancing the mission of the university by planning, developing and implementing diverse programs to engage USC's alumni constituency. Scott also serves as chief executive officer of the USC Alumni Association and works closely with its Board of Governors.

Scott came to USC from the George Washington University, where he served as assistant vice president for alumni relations and annual giving. Additionally, as an adjunct professor in the university's law school, he taught a first-year course on legal research, writing and oral advocacy. From 2002 to 2003, he was a member of the George Washington University Board of Trustees, and he was a member of the GW Alumni Association Board of Directors from 2000 to 2003.

In the broader community, Scott is a frequent presenter at conferences of the Council for the Advancement and Support of Education (CASE) and is a member of CASE's Commission on Alumni Relations. He also served a term as secretary of the Board of Directors of the Association of Private College and University Alumni Directors and is a member of the Council of Alumni Association Executives.

Scott holds a B.A. from the George Washington University and a J.D. from the George Washington University Law School. His previous professional experience includes clerking for the Hon. John Garrett Penn of the U.S. District Court for the District of Columbia and practicing as a litigation associate at the New York office of Cahill Gordon & Reindel LLP.

## **USC Alumni Association Senior Managers**

Mark McBride, Executive Director of Alumni Relations (Programs and Events, Business Partnerships and Sponsorships)

Patrick E. Auerbach, Executive Director of Alumni Relations (Alumni Clubs and Communities, Reunions, Campus Partnerships and Philanthropy)

Grace Shiba, Senior Director of Alumni Relations (USC Asian Pacific Alumni Association)

Cheryl Collier, Senior Director of Communications and Marketing

Hillary Duncan, Administrative Director

Sean Uray, Deputy Administrative Director

*Total USC Alumni Association staff: 36*

### **Mark McBride, Executive Director of Alumni Relations**



Mark McBride joined the USC Alumni Association in early 2006 and currently serves as executive director of alumni relations. Mark develops and produces the USC Alumni Association's signature events; oversees the USCAA's special interest programs including the alumnae groups and the USC Asian Pacific and USC Lambda LGBT Alumni Associations; and oversees the USCAA's business partnerships and sponsorships program.

Previously, Mark served as director of special events for Project Angel Food, where he produced the nation's largest fashion fundraiser, "Divine Design," which raised more than \$16 million for the organization's meal delivery program. He was also managing director of the Food Network's "Semi-Homemade Cooking with Sandra Lee."

### **Patrick E. Auerbach, Executive Director of Alumni Relations**



Patrick Auerbach joined the USC Alumni Association staff in January 2008 and currently serves as executive director of alumni relations. Patrick oversees alumni engagement efforts in the areas of alumni clubs and communities, reunions, generational groups and campus partnerships. Patrick also coordinates USCAA philanthropy initiatives with the CEO and develops opportunities to integrate such efforts across the USC Alumni Association.

Previously, Patrick spent seven and a half years as director of operations and marketing for the USC Women's Basketball program. He oversaw the team's administrative operations and created marketing and community relations opportunities that more than doubled average home game attendance and increased ticket sales and



revenue nearly eight-fold. Patrick holds a B.A. in sociology from UCLA and an M.S. in sport administration and management from the University of Tennessee-Knoxville. In 2008 he earned his Ed.D. from the USC Rossier School of Education, completing the dissertation “Decisions under Influence: College Presidents’ Athletics-Related Decision-Making Behavior at NCAA Division I Football Bowl Subdivision Institutions.”

**Grace Shiba, Senior Director of Alumni Relations**



Grace Shiba joined the USC Alumni Association in February 2005 and is responsible for leading the USC Asian Pacific Alumni Association in its efforts to engage USC’s Asian American alumni and raise funds for scholarships.

Previously, Grace was the vice president of business development for an advertising and design agency, Preston Davis West, and prior to that she held a number of management positions in operations and sales with Hyatt Hotels and Resorts.

Grace served on the USC Alumni Association Board of Governors for seven years, was a past president and member of the Asian Pacific Alumni Association Board of Directors, and was an advisor to the USC Asian American Business Association. She is also a former member of Town and Gown of USC and a current member of Skull & Dagger. In addition, she is active in the Asian Pacific American community. Grace holds a B.A. from the USC Dornsife College of Letters, Arts and Sciences.

**Cheryl Collier, Senior Director of Communications and Marketing**



Cheryl Collier joined the USC Alumni Association in October 2008. As senior director of communications and marketing, Cheryl is responsible for the overall communications efforts of the USC Alumni Association: conceiving messages, developing tools for distributing those messages and maximizing resources for alumni outreach while maintaining consistency with the mission, vision and goals of the university. Cheryl oversees all USCAA print and electronic communications, including its website, and the Trojan Travel program.

Previously, Cheryl served as manager of communications for the Southern California Association of Governments, the nation’s largest

metropolitan planning organization. Cheryl holds a B.A. in sociology and an MBA from Southern Illinois University.

**Hillary Duncan, Administrative Director**



Hillary Duncan joined the USC Alumni Association in December 2002 and was promoted to administrative director in April 2010. In this capacity, Hillary is responsible for the day-to-day operations of the USC Alumni Association, directing administrative functions such as budget and finance, human resources, facilities, and technology integration. In addition to overseeing USCAA operations, Hillary also manages all operations of the USC Alumni Association Board of Governors, its Executive Committee, and the Alumni Presidents Council.

Prior to joining USC, Hillary worked as office manager and executive assistant for MicroFabrica Corporation in Burbank, CA, a micro-technology company. Hillary holds a B.A. in psychology from California State University, Long Beach.

**Sean Uray, Deputy Administrative Director**



Sean Uray joined the USC Alumni Association in October 2008. As deputy administrative director he is responsible for managing a myriad of administrative and financial functions including budget planning, accounts payable/receivable, account reconciliations, human resources, and technology integration.

Prior to joining USC, Sean was the director of business services for the Venetian-Palazzo Resort Hotel & Casino in Las Vegas, Nevada. Sean holds a B.S. in international business administration from the University of Nevada, Las Vegas, and speaks French and Spanish fluently.

## **Key Functions in Alumni Relations**

### *USC Alumni Association Executive Office and Administration*

- Manage the USC Alumni Association Board of Governors and the Alumni Presidents Council; staff the Board of Trustees Alumni Affairs Committee
- Provide strategic leadership to alumni organizations chartered by or affiliated with the USC Alumni Association; provide specific outreach to the Latino Alumni Association and Black Alumni Association (both part of the Division of Student Affairs)
- Coordinate the USC Alumni Association agenda with colleagues in University Advancement and University Relations
- Oversee the USC Alumni Association's fundraising efforts
- Convene the USC Alumni Relations Council to coordinate university-wide alumni relations functions, with emphasis on the schools, Athletics and USC career services
- Manage the Epstein Family Alumni Center and the Widney Alumni House
- Manage all aspects of the USC Alumni Association customer service experience
- Provide leadership to administrative functions such as budget, human resources, facilities management, technology integration, and strategic planning
- Support the distribution of more than \$2 million per year in scholarships (including university matching funds) through chartered and affiliated alumni organizations
- Stay abreast of industry trends through membership in professional organizations to ensure awareness of best practices in alumni relations and university development

### *Signature Events and Business Partnerships*

- Coordinate USC Alumni Association signature events including Alumni Awards, Homecoming, BOG Emeriti reunions, USC Alumni Leadership Conference and Volunteer Recognition Dinner
- Recruit corporate sponsors and business partners for the USC Alumni Association, which generate about one-third of the USC Alumni Association operating budget
- Organize programs for home and away football games (i.e., Weekenders)
- Support signature events sponsored by affiliated alumni organizations as needed

### *Affinity Groups – Alumnae Groups, APAA and Lambda*

- Provide strategic leadership to the volunteer boards of the USC Asian Pacific Alumni Association and the USC Lambda LGBT Alumni Association
- Organize signature events such as the APAA Golf Tournament, the APAA Scholarship Gala and the Lambda Don Thompson Movie Night
- Support relevant student offices and student organizations that serve Asian Pacific, international and LGBT student populations
- Plan, develop and implement the annual USC Women's Conference

- Advise the Alumnae Coordinating Council and the 19 alumnae/women's support organizations that comprise it
- Act as a resource for other affinity groups not chartered by the USC Alumni Association

#### *Domestic and International Regional Programs*

- Plan, develop and implement programs across the United States and around the world to engage USC alumni in the advancement of USC, including more than 50 annual SCend Offs for newly admitted students
- Advise more than 60 regional alumni clubs across the United States and around the world, including developing club charters
- Serve as a resource to USC deans, faculty and administrators traveling abroad, and as a liaison to USC's international offices
- Support the maintenance of international alumni contact information

#### *Generational Programs*

- Plan, develop and implement programs to engage USC alumni that are based on age/generational characteristics, and provide strategic leadership to the groups supporting this goal (Half Century Trojans, Second Decade Society and Young Alumni Council)
- Advise Society 53, USC's student-alumni outreach organization, in its efforts to enhance USC Alumni Association awareness and identity among current USC students
- Administer Reunion Weekend, comprising the 50<sup>th</sup>, 40<sup>th</sup>, 30<sup>th</sup>, 25<sup>th</sup> and 10<sup>th</sup> undergraduate reunions, including volunteer leadership recruitment, reunion planning and fundraising
- Conduct annual series of signature events, including Trojan SCuppers, Senior SCend Off, Young Alumni Summer Party, Young Alumni Winter Celebration, Half Century Trojans Annual Luncheon and Going Back to College Day

#### *Communications and Marketing*

- Develop alumni communications including the USC Alumni Association annual report; the website and social media sites; newsletters such as the *USConnection* (monthly) and *Around Town* (monthly calendar); the official USC alumni directory; and collateral materials on alumni programs and services
- Develop content for university publications such as *USC Trojan Family Magazine*, *USC Chronicle*, *USC News* and *The Daily Trojan*
- Manage the relationships and fulfillment of obligations to corporate sponsors and business partners, including alumni merchandise programs
- Provide ongoing member services support to all USC alumni
- Administer Trojan Travel and related services and volunteer programs

*Critical departmental functions during an emergency*

- Maintain communications with alumni regarding USC, its programs, and its people
- Engage USC's alumni through various programs and benefits to support USC, as needed

## **Chartered and Affiliated Alumni Organizations**

USC Alumni Association Board of Governors

USC Alumni Presidents Council (former presidents of the USC Alumni Association)

BOG Emeriti (former members of the USC Alumni Association Board of Governors)

### **Regional alumni clubs**

USC Alumni Club of Atlanta (GA)

USC Alumni Club of Austin (TX)

USC Alumni Club of Bakersfield/Kern County (CA)

USC Alumni Club of Beijing (China)

USC Alumni Club of Beverly Hills/Hollywood (CA)

USC Alumni Club of Boston (MA)

USC Alumni Club of Chicago (IL)

USC Alumni Club of Dallas/North Texas (TX)

USC Alumni Club of Colorado (CO)

USC Alumni Club of Downtown Los Angeles (CA)

USC Alumni Club of East Bay (CA)

USC Alumni Club of Fresno/Central California (CA)

USC Alumni Club of Hawaii

USC Alumni Club of Hiroshima (Japan)

USC Alumni Club of Hong Kong (China)

USC Alumni Club of Houston (TX)

USC Alumni Club of Hsinchu (Taiwan)

USC Alumni Club of Huntington Beach (CA)

USC Alumni Club of Indianapolis (IN)

USC Alumni Club of Indonesia

USC Alumni Club of the Inland Empire (CA)

USC Alumni Club of Kansai (Japan)

USC Alumni Club of Kansas City (MO)

USC Alumni Club of Kaohsiung (Taiwan)

USC Alumni Club of Lake Tahoe (NV)

USC Alumni Club of Las Vegas (NV)

USC Alumni Club of London (United Kingdom)

USC Alumni Club of Long Beach (CA)

USC Alumni Club of Mexico

USC Alumni Club of Mumbai (India)

USC Alumni Club of Nagoya (Japan)

USC Alumni Club of New Mexico (NM)

USC Alumni Club of New York (NY)  
USC Alumni Club of Newport/Irvine (CA)  
USC Alumni Club of North Bay (CA)  
USC Alumni Club of North Orange County (CA)  
USC Alumni Club of Palm Springs (CA)  
USC Alumni Club of Paris (France)  
USC Alumni Club of Pearl River Delta (China)  
USC Alumni Club of Philadelphia (PA)  
USC Alumni Club of the Philippines  
USC Alumni Club of Phoenix (AZ)  
USC Alumni Club of Oregon (OR)  
USC Alumni Club of Richmond/Central Virginia (VA)  
USC Alumni Club of Sacramento (CA)  
USC Alumni Club of San Diego County (CA)  
USC Alumni Club of San Fernando Valley (CA)  
USC Alumni Club of San Francisco (CA)  
USC Alumni Club of San Gabriel Valley (CA)  
USC Alumni Club of San Luis Obispo (CA)  
USC Alumni Club of Santa Barbara (CA)  
USC Alumni Club of Santa Clarita Valley (CA)  
USC Alumni Club of Seattle (WA)  
USC Alumni Club of Seoul (South Korea)  
USC Alumni Club of Shanghai (China)  
USC Alumni Club of Silicon Valley (CA)  
USC Alumni Club of Singapore  
USC Alumni Club of South Bay (CA)  
USC Alumni Club of South Orange County (CA)  
USC Alumni Club of Taipei (Taiwan)  
USC Alumni Club of Tokyo (Japan)  
USC Alumni Club of the Twin Cities (MN)  
USC Alumni Club of Utah  
USC Alumni Club of the Nation's Capital (DC)  
USC Alumni Club of West Los Angeles (CA)

## Multicultural Alumni Associations

Asian Pacific Alumni Association  
Black Alumni Association (Division of Student Affairs)  
Lambda LGBT Alumni Association  
Latino Alumni Association (Division of Student Affairs)

## Generational Groups

Half Century Trojans (earned a bachelor's degree 50+ years ago)  
Second Decade Society (ages 35-45)  
Young Alumni (ages 22-35)  
Society 53 (current students)  
Reunion Committees (10<sup>th</sup>, 25<sup>th</sup>, 30<sup>th</sup>, 40<sup>th</sup> and 50<sup>th</sup> reunions)

## Alumnae (Women's) Groups

Alumnae Coordinating Council (umbrella organization of all the women's groups)

Association of Trojan Leagues (umbrella organization of all the Trojan Leagues)  
Trojan League of Los Angeles  
Trojan League of Orange County  
Trojan League of South Bay  
Trojan League Associates of the Desert  
Trojan League Associates of the Foothills  
Trojan League Associates of San Diego County  
Trojan League Associates of the Valleys

Town and Gown of USC  
Town and Gown Jr. Auxiliary of Los Angeles  
Town and Gown Jr. Auxiliary of Orange County  
Trojan Affiliates  
Trojan Guild of Los Angeles  
Trojan Guild of Orange County  
Trojan Junior Auxiliary

Interfraternity Parents Council  
Intersorority Parents Council  
The Norris Auxiliary  
USC University Hospital Guild



**USC ALUMNI ASSOCIATION  
2010-2011 ACCOMPLISHMENTS**

The past year marked an exciting chapter in the history of both USC and the Trojan Family. Under the visionary leadership of USC's 11<sup>th</sup> president, Dr. C. L. Max Nikias, the university embarked on a "great adventure" – and the USC Alumni Association was there every step of the way, demonstrating that USC alumni are one of the university's most valuable resources.

In addition, the USC Alumni Association celebrated two major milestones during the 2010-2011 academic year. We commemorated the 125<sup>th</sup> anniversary of our founding and moved into our new home: the Epstein Family Alumni Center in the Ronald Tutor Campus Center. Not only did we acquire a new physical home, but we also acquired a new administrative home. In August 2010, we joined the division of University Advancement, under the leadership of Senior Vice President Al Checcio. Our move to Advancement is again a vote of confidence in the Trojan Family.

We achieved all of the specific goals we set out last year. The most significant of these include:

- ✓ Successfully introduced USC President C. L. Max Nikias and First Lady Niki C. Nikias to more than 4,000 members of the Trojan Family across the country through nine Trojan Family Receptions (in Orange County, San Diego, Beverly Hills, Los Angeles, Santa Barbara, San Francisco, Washington D.C., New York City and Chicago) which we co-hosted with the university;
- ✓ Transitioned our Widney Alumni House staff to our new headquarters in the Epstein Family Alumni Center and transferred our University Village staff to the Widney Alumni House;
- ✓ Expanded the USC Alumni Association Reunions Program with the launch of two new annual reunions (30- and 40-year) and the addition of four new staff members – a director of reunions and three associate directors of reunions;
- ✓ Worked with the USCAA Board of Governors Club Affairs Committee to develop a new charter for our regional clubs, and also developed a new, more comprehensive and accessible club webpage template;
- ✓ Established the USC Alumni Club of Mumbai and participated in the USC delegation of trustees, faculty and staff that traveled to India in February;
- ✓ Expanded the ambassadorial role of members of the USCAA Board of Governors by having them attend USCAA events to greet alumni and USCAA partners and sponsors;
- ✓ Developed our efforts to outreach alumni outreach via social media by giving greater visibility to social media icons on our website and in print and electronic communication, and dedicating increased staff hours to managing our social media (Facebook, LinkedIn, Flickr) pages

## USC ALUMNI ASSOCIATION PRIORITIES

1. Devote considerable time to visits with alumni organizations and reconnecting with school alumni programs
2. Partner with campus leaders, like Provost Garrett, to host programs that highlight USC's academic priorities
3. Implement plan for reunion engagement and fundraising programs
4. Dedicate specific effort to improving USC and USCAA presence and engagement in Los Angeles and Orange County
5. Define and fulfill the USCAA's role in the campaign; develop tools to improve volunteer knowledge and support of the campaign
6. Maintain visibility of the USC Alumni Association across the University and the Trojan Family; continue working with University Communications to better incorporate messages and stories for and about alumni into the larger university communications plan
7. Maintain performance of association events, business partnerships and communications and marketing programs
8. Improve campus and alumni knowledge of the Board of Governors
9. Reinvigorate communication and collaboration with special interest organizations like the Alumnae Coordinating Council and its member groups, the Asian Pacific Alumni Association, the Black Alumni Association, the Lambda LGBT Alumni Association, the Latino Alumni Association, and Town and Gown of USC
10. Host international alumni leadership program in conjunction with the Global Conference
11. Develop productive relationship with the new executive director of the university career center to keep enhancing career programs for alumni

Finalized August 25, 2011

## **USCAA Staff Contacts**

Your main point of contact at the USC Alumni Association is your staff liaison, identified at the beginning of each fiscal year, and subject to change at any time due to USCAA staffing or organizational changes.

A current list of USC Alumni Association staff can be found online at <http://alumni.usc.edu/about/contact/staff.html>. Below is an abbreviated list of department contacts. Please always cc your staff liaison on any communications to other USCAA or university staff.

USC Alumni Association  
Epstein Family Alumni Center  
3607 Trousdale Parkway, TCC 305, Los Angeles, CA 90089-3106  
Phone: (213) 740-2300; Fax (213) 740-0729  
*alumni@usc.edu*

### **Executive Office**

Scott M. Mory, Esq.  
Associate Senior Vice President for  
University Advancement  
CEO, USC Alumni Association  
(213) 740-2300  
*mory@usc.edu*

Sarah Wentworth  
Executive Coordinator  
(213) 740-1615  
*sarah.wentworth@usc.edu*

### **Association Programs and Special Interest Groups**

Mark McBride  
Executive Director  
(213) 740-0904  
*mark.mcbride@usc.edu*

Danielle Harvey '00  
Director  
Special Interest Programs  
(213) 740-6273  
*harveyd@usc.edu*

Mark Coy  
Director  
Association Events  
(213) 821-3497  
*mcoy@usc.edu*

Grace Shiba '77  
Senior Director  
Asian Pacific Alumni Association  
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*grace.shiba@usc.edu*

## **Communications and Marketing**

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Senior Director  
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Teri Kirkendoll '70, MA '79  
Associate Director  
Trojan Travel  
(213) 740-1816  
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## **Reunions and Alumni Clubs and Communities**

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Executive Director  
(213) 740-9490  
*patrick.auerbach@usc.edu*

Harmony Frederick  
Associate Director  
Alumni Clubs and Communities  
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Annette Ramirez  
Director, Reunions  
(213) 821-6257  
*aramirez@alumnnicenter.usc.edu*

Erin Williams Jebavy MA '08  
Associate Director  
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*erinwill@usc.edu*

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Senior Associate Director  
Alumni Clubs and Communities  
(213) 740-9206  
*jwiener@usc.edu*

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Coordinator  
Alumni Club Scholarships  
(213) 740-5944  
*barrera@alumnnicenter.usc.edu*

Jeremy Wingerter  
Senior Associate Director  
Alumni Clubs and Communities  
(213) 740-5196  
*jeremy.wingerter@usc.edu*

## **University Directory**

### **Office of Admission**

<http://www.usc.edu/admission/>

(213) 740-1111

Alumni interested in volunteering for Office of Admissions events and college fairs should contact Anne Aubert-Santelli, Senior Assistant Director, Office of Admission at (213) 740-7421 or [aubertsa@usc.edu](mailto:aubertsa@usc.edu).

If students have questions related to applying or admission decisions, please have them speak with Student Services Contact Center counselors at (213) 740-1111.

### **USC Athletics**

For Athletic event schedules, team information and more, visit <http://www.usctrojans.com/>.

### **Ticket Office**

<http://www.usctrojans.com/tickets/usc-tickets.html>

(213) 740-4672

### **Career Center**

<http://alumni.usc.edu/benefits/offers/careers.html>

<http://careers.usc.edu>

(213) 740-9111

The Career Center offers alumni free access to connectSC job listings, one complimentary counseling session plus other benefits.

### **USC Spirit of Troy - Trojan Marching Band**

<http://www.usc.edu/dept/band/>

(213) 740-6317

[tmb@usc.edu](mailto:tmb@usc.edu)

### **Schools**

For a full list of USC Schools, visit <http://alumni.usc.edu/groups/campus/>.

### **Libraries**

<http://www.usc.edu/libraries/>

<http://alumni.usc.edu/benefits/libraries/>

(213) 740-2543

# **ALUMNI CLUB OVERVIEW**

### **Alumni Club Mission**

The USC Alumni Association's regional clubs promote the mission of the USCAA on a local level to alumni and friends. Accordingly, the Clubs offer a diverse selection of activities and programs aimed at growing the number of event attendees; build a culture of philanthropy by working to provide opportunities for Trojans to contribute financially to the Club, the USCAA and the university; serve as a representative voice for alumni by communicating regularly with local Trojans as well as with USCAA staff; convey information about USC to alumni and about local alumni to USC; help facilitate USC programs in their local area; and foster a spirit of volunteerism among the Trojan Family by growing club membership and creating meaningful and convenient opportunities for alumni and friends to volunteer their time and services on behalf of USC.

### **Alumni Club Value Statement**

The USC Alumni Club of \_\_\_\_\_ provides a lifetime of opportunities to keep your USC connection alive. Through the generous time given by its volunteers, the club connects alumni with the university, advertises the USC experience, helps build professional relationships among alumni, friends and the community, and creates bonds among the local Trojan Family. In addition, the club provides scholarships to local students attending USC.

Without the efforts of volunteers, there would be no programming in your area such as USC SCend Offs or game watches; it would be more difficult to connect with your fellow local Trojans; and local USC students would not benefit from club scholarships. If you are a proud USC alum, parent, friend or university supporter, we encourage you to join us and get involved!

# USC Alumni Demographics

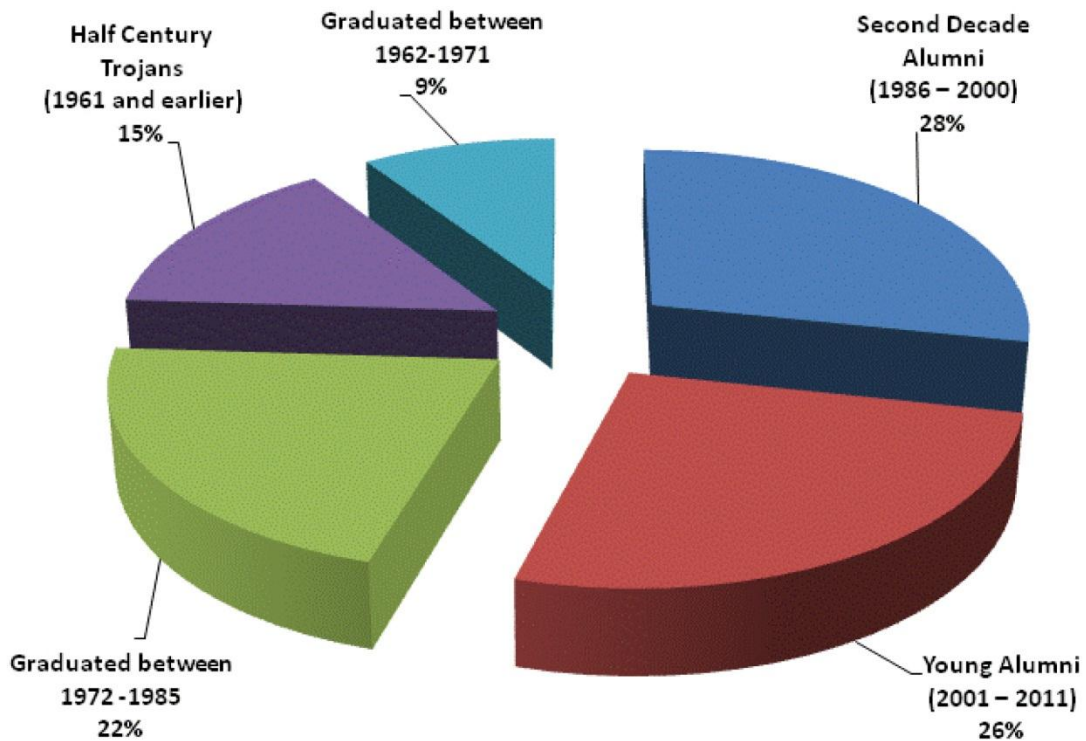
**Top Domestic Alumni Clubs  
By Membership**

| <i>Club Name</i>     | <i>Membership</i> |
|----------------------|-------------------|
| Downtown Los Angeles | 1,914             |
| West Los Angeles     | 1,872             |
| New York City        | 1,774             |
| Nation's Capital     | 1,660             |
| San Diego            | 1,351             |
| Newport/ Irvine      | 1,349             |
| San Gabriel Valley   | 1,105             |
| South Bay            | 932               |
| Seattle              | 900               |
| Chicago              | 837               |

**Top International Alumni Clubs  
By Membership**

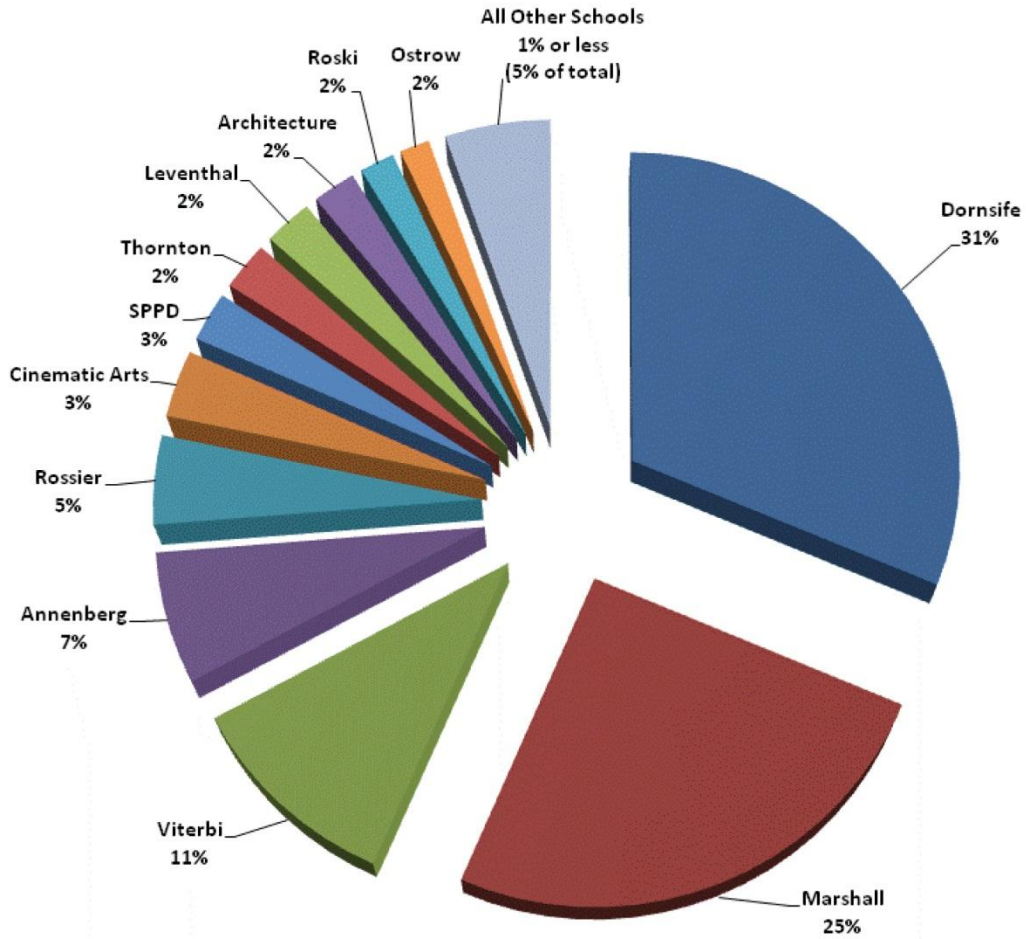
| <i>Club Name</i> | <i>Club Members</i> |
|------------------|---------------------|
| Hong Kong        | 1,034               |
| Taipei           | 524                 |
| London           | 474                 |
| Tokyo            | 234                 |
| Seoul            | 167                 |

## Alumni by Age Range





## Percentage of Alumni by School



### **Alumni Club Demographic Breakdown**

Your club liaison can provide you with an alumni demographic breakdown for your region similar to the sample below. Knowing how your community is comprised can help you plan programming that best suits your club's audience.

#### **Sample: North Orange County**

Number of Contactable Alumni: 8,583

Number of Alumni with Email Addresses: 4,544

Club Members in Harris: 548

#### **Breakdown by Lifecycle**

Young Alumni (2001 – 2011): 2,674

Second Decade Alumni (1986 – 2000): 2,528

Graduated between 1972 -1985: 1,940

Graduated between 1962-1971: 775

Half Century Trojans (1961 and earlier): 666

| <b>Top 5 Cities Represented</b> | <b>Number per City</b> |
|---------------------------------|------------------------|
| ANAHEIM                         | 1,240                  |
| FULLERTON                       | 1,229                  |
| SANTA ANA                       | 1,041                  |
| ORANGE                          | 920                    |
| YORBA LINDA                     | 775                    |

| <b>Top 15 USC Schools and Departments Represented</b> | <b>Number of Alumni per School</b> |
|---|------------------------------------|
| USC Marshall School of Business                       | 1,971                              |
| USC Viterbi School of Engineering                     | 1,662                              |
| USC Dornsife College of Letters, Arts and Sciences    | 1,332                              |
| USC Rossier School of Education                       | 509                                |
| Herman Ostrow School of Dentistry of USC              | 459                                |
| USC School of Pharmacy                                | 442                                |
| USC School of Policy, Planning and Development        | 320                                |
| USC School of Social Work                             | 300                                |
| USC Annenberg School for Communication & Journalism   | 284                                |
| USC Leventhal School of Accounting                    | 222                                |
| USC Gould School of Law                               | 203                                |
| Keck School of Medicine of USC                        | 198                                |
| USC Thornton School of Music                          | 126                                |
| USC Graduate School                                   | 79                                 |
| Div. of Occupational Science/Occupational Therapy     | 81                                 |

### **What Constitutes an Alumni Club?**

USC Alumni Clubs are regional groups based on geographic locations throughout the United States and across the world. They offer USC alumni, parents and friends the opportunity to get together and celebrate their connection to USC. Alumni Clubs plan and put on great events, raise money for USC student scholarships and do volunteer work in their communities. They help keep members of the Trojan Family connected to one another and the university lifelong and worldwide, by providing a great forum for networking and – even more important – for having fun!

The USC Alumni Association oversees more than 80 Alumni Clubs around the world. They share the same mission as the USC Alumni Association and achieve their objectives in the following six ways:

1. **Outreach** – to expand Club membership by effective communication with local alumni
2. **Engagement** – to encourage alumni participation in Club activities
3. **Events** – to plan and provide diverse activities and programs that engage alumni of varying ages, backgrounds and interests and that a) give participants access to something they wouldn't have access to on their own; b) teach participants something new; and/or c) assist participants in advancing their careers
4. **Scholarship and Recruitment** – to raise scholarship funds and assist the university in recruiting talented students from the Club region
5. **Volunteerism** – to provide meaningful opportunities for alumni to volunteer at both the university and community level
6. **Fundraising** – to enhance the Club's financial resources in order to advance the objectives listed above

Alumni Clubs must:

1. Submit a Club charter on an annual basis and follow the policies and regulations set by the USCAA and the university
2. Have a significant population of alumni in their area and meet other criteria to justify the Club's presence and administration
3. Have an active leadership group with officers
4. Maintain a strong, active and *frequently updated* web presence
5. Hold successful and varied programs and events
6. Engage in regular efforts to increase Club membership and participation
7. Participate in efforts to welcome new alumni and students each spring/summer (i.e., USC SCend Offs)
8. Participate in the USCAA's annual Alumni Leadership Conference
9. Serve as a local resource for all current and incoming students and their parents

### **Why Volunteer?**

The key to a successful Alumni Club is getting as many diverse USC alumni as possible involved in activities that promote the Club and the university. You have the makings of a great Alumni Club volunteer if you:

- Keep actively involved with and connected to USC
- Have enthusiasm for USC and want to give back
- Want to increase the visibility of USC in your local community
- Serve as an ambassador for USC in your local community
- Supply feedback to the university through the USCAA
- Support local admission receptions and/or SCend Offs which help enhance USC student experience
- Have the ability to effectively delegate assignments among a diverse group of people
- Are flexible and willing to recruit and work with other volunteers
- Are aware of and interested in current issues, trends and events pertaining to USC and your local community
- Welcome the opportunity to learn new skills by working with others
- Would like to build and benefit from your USC network

## **Responsibilities of Alumni Club Staff Liaison**

### **Communications:**

- Communicate with Club leaders and at times participate in events, meetings and planning
- Furnish updates regarding the USCAA and USC and, when possible, inform Club leaders of university-related events taking place in the region
- Provide listserv for facilitating communication with Club members and templates for enhancing Club's web presence
- Offer periodic training to Club leaders including the exchange of best practices Respond to Alumni Club leader inquiries in a timely, accurate manner

### **Engagement:**

- Coordinate (as time and resources permit) regional events, identify potential areas of participation from campus partners and provide support
- List Club events on the USCAA website and support key events with e-mail publicity and, when feasible, other methods of communications
- Coordinate a SCend Off program with campus partners and Club
- Coordinate scholarship program with campus partners and Club
- Coordinate and organize USC Football Weekender programs with Club
- As resources permit, assist Club in obtaining materials that brand it as a USC Club, such as banners with the Club name and logo, business cards and stationery for key leaders , etc.

### **Club Relations:**

- Acknowledge and celebrate the service and leadership of Club volunteers
- Connect Club leaders to the university and one another
- Assist with administration of finances and the facilitation of fundraising
- Provide statements of funds in the Club scholarship account twice a year
- Promote the Club in communications
- Connect the Club with the USCAA Board of Governors

# **MEMBERSHIP**

### **Who may join a USC Alumni Club?**

USC Alumni Clubs are open to all alumni, students, parents and friends of the university; in short, anyone with any connection or affinity to USC may join.

Though clubs may not charge dues, they may maintain *voluntary* USCAA template-approved donation pages on their websites to encourage support of their operations and/or scholarship fundraising. Clubs may also implement structured annual giving fundraising through the Patron Program (please visit <http://alumni.usc.edu/clubhandbook> to view current policies).

Though USC Alumni Clubs serve specific geographic areas, alumni and friends may participate in whichever Club is most convenient or relevant to them. In addition, USC has more than 75 clubs and organizations around the world, and all alumni and friends are invited to connect with these groups whenever they travel. For a complete listing of USC Alumni Clubs, visit <http://alumni.usc.edu/groups/clubs>.

### **Club Sign-Up Methods**

Membership is based on an “opt-in” registration system. Alumni and friends may register online to receive communications from up to three club listservs.

All USC alumni are automatically members of the USC Alumni Association who receive periodic communications including *USC Trojan Family Magazine* and regionally targeted e-mails. Clubs should encourage alumni to maintain current records with the USCAA and the university and to sign up for Club communications via the USCAA website. To sign up to receive specific USC Alumni Club communications, alumni should register with Fight On!line, the USC Alumni Association’s online community. Registering with Fight On!line affords alumni additional benefits, including a lifetime e-mail forwarding address as well as access to the USC online directory.

To register with Fight On!line, alumni should follow these instructions :

- Visit <http://alumni.usc.edu/benefits/online>
- At the “Registration Step 1” page, you will need to find yourself among the list of USC alumni by entering your last name as it appears on the mailing label of your current copy of *USC Trojan Family Magazine*. Once you have located your last name, click "submit."
- Locate and click on your name on the “Registration Step 2” page. For “Step 3,” you will need to verify that this is indeed your record by entering your Alumni Record Number as it appears on the mailing label of your *USC Trojan Family Magazine* or on your USC Alumni Association membership card. Click "submit."
- In “Step 4” (the final step!) choose a user name and password. (**Note:** *Choose your user name carefully since you will not be able to change it later.*)

- The user name you select will be used as the prefix of your permanent e-mail forwarding address (i.e., *user name@alumni.usc.edu* or, for example, *TommyTrojan@alumni.usc.edu*).

Alumni may at any time update their alumni profiles at Fight On!line and choose the Clubs and organizations from which they wish to receive e-mail communications.

Non-alumni friends may register to receive Club communications at <http://alumni.usc.edu/clubsignup>.

Attracting new Club members is vital to your USC Alumni Club and leadership succession on your board. There are several ways to engage new members:

- **Open Houses:** Clubs are encouraged to invite all local alumni to an annual “open house” where they can learn more about the Club, its activities and its volunteer opportunities. Typically, such open houses are held in spring, before club elections.
- **E-Mail Campaigns:** Once a Club is chartered and has a robust menu of events and activities in place, the USC Alumni Association can help spread the word. You can work with your staff liaison to develop e-mails to all alumni in your geographical area (including those not on your listserv) to invite them to join the Club e-mail list and to attend your open house and other significant Club activities.
- **Web Presence:** Keep your Club shell page and/or website up-to-date. Each Club is listed at <http://alumni.usc.edu/groups>. The Club name may link either to a Club shell page, which lists the Club e-mail address and other general information, or it may link directly to the Club’s own website. Clubs should keep their information up-to-date and assign a volunteer to respond to e-mails generated by these pages.
- **Engage Recent Graduates:** All USC students receive a USC Alumni Association membership card upon graduation. Along with the card, each graduate also receives information about signing up for their local Alumni Club. The USCAA encourages Clubs to organize “Welcome New Grad” events in early fall to connect them with the Club and provide new grads with networking opportunities. To learn more about how to organize a "Welcome New Grad" event, contact your staff liaison.
- **Support USCAA- or University-Sponsored Events:** When the USCAA or a USC school or department hosts an event in your area, work with your Club liaison to see what opportunities are available to become involved. Club volunteers should offer to assist with greeting guests and registration. A networking component is often built into these events, and you are encouraged to let guests know about your Club and its activities (bring your business cards!). Clubs may also work with their Club liaison to distribute flyers advertising Club activities or to make a short presentation during the event program.
- **Coordinate with Other Local Groups:** Clubs may have neighboring USC organizations with overlapping presence or nearby regional organizations (such as the



USC Marshall Alumni Association, women's groups or USC Athletics Trojan Clubs). USC Alumni Clubs are encouraged to collaborate with these organizations on events and activities that will benefit both groups. Many Trojans like to be involved in more than one organization and by partnering with other USC groups, you gain access to their membership and allow them to see what your Club has to offer.

- **Submit Event Listings, Photos and Article Ideas for USCAA Publications:** The USCAA encourages alumni and friends to get involved with local Clubs through *USConnection*, a monthly e-newsletter sent to more than 150,000 alumni across the globe, as well as through articles and advertisements in *USC Trojan Family Magazine*, mailed to 250,000 alumni, parents and friends each quarter. The USCAA's *Around Town* monthly e-newsletter, which reaches 90,000 alumni and friends in Southern California, publishes information about SoCal Club events. Clubs may work with their staff liaison to propose article ideas or submit event listings for these publications.

**Serve as Liaison between the USCAA and Local Alumni Community:** As a representative for the USCAA and USC, keep in contact with your local community and provide local news sources (weekly and daily newspapers, blogs, etc.) with pictures of key events and information about Club events open to the broader USC community, such as SCend Offs.

**Word of Mouth:** Personal endorsements are key, so encourage your board and other Club members to invite alumni and friends either new to the Club or lapsed in their participation. Word of mouth is an effective tool for spreading the message that Alumni Club activities are a lot of fun!

### **How do you retain members?**

To sustain Club membership, make members feel welcome and part of the Club through regular e-mail and social media communications ; engagement via a robust calendar of activities; and opportunities for volunteer involvement. The following best practices will help you maintain an active membership:

- **Welcome New Members at Events and Meetings:** Introduce newcomers to the Club board and members.
- **Provide Volunteer Engagement Opportunities:** Encourage and facilitate meaningful involvement within your organization. Offer opportunities to join the board, serve as ad hoc volunteers at events, work with USC admissions representatives at recruitment events, etc.
- **Hold Regular, Open Board Meetings at Least Twice a Year:** For Club continuity, success and participation, regular open board meetings are a good idea. Continually search for new potential leaders among Club members.
- **Develop an Integrated Communications Plan:** Consider your communications channels—the Club website, social media pages (Facebook, Twitter, Linked In, etc.) and Harris Connect (event pages and listserv) – and create a plan for how to use these mediums consistently to promote your activities and events. Refer to the following Communications section of this *Club Handbook* for more information.



# COMMUNICATIONS

### **Templates and logos**

On the USC Alumni Association website at <http://alumni.usc.edu/graphicresources> you will find a valuable, easy-to-use resource to help you simplify and enhance your Club communications through the successful application of our USCAA graphic elements. Here you'll find the logos for domestic and international clubs as well as for affiliated alumni groups, multicultural alumni associations and the USCAA. You will also find useful templates and design samples for various print and electronic communications materials.

The logos are provided in cardinal, white and black for each organization and in the following formats: EPS (for print), JPG (for print and web) and GIF (for transparent web). Logos provided are primarily horizontal (Tommy Head on the left with text to the right) though some Clubs will find vertical options as well. Files are downloaded all together in a zipped folder. If you have any questions about the use of these files or if you need a particular logo that does not appear on the site, please e-mail Daniel Campagna, USCAA associate director of communications, at [daniel.campagna@usc.edu](mailto:daniel.campagna@usc.edu).

Further information about the use of USC logos, colors and graphic elements can be found on the university website at [www.usc.edu/identity](http://www.usc.edu/identity).

## **Websites**

### **USCAA Website**

Easily navigable and updated regularly, the USC Alumni Association website – <http://alumni.usc.edu> – provides a comprehensive overview of USCAA programs, events and services, including access to the USC online community, *FightOn!Line*; university and alumni news; special offers for alumni of all ages and backgrounds; and social media links for Facebook, LinkedIn, Twitter and Flickr. For Alumni Club leaders, this content-rich website is both a valuable information resource and an effective marketing tool for keeping alumni connected to USCAA and the Trojan Family.

Currently, the USCAA website also features links to two monthly e-newsletters: *USConnection* (USC and alumni news, events and updates) and *Around Town* (upcoming USC and alumni events in Southern California).

### **Club Websites**

USC Alumni Club websites must conform to the USCAA-approved website design template, which can be accessed at <http://alumni.usc.edu/graphicresources>. The USCAA must have access to any websites maintained by a third party.

### **Harris Connect**

To create an event registration page, simply go to: <http://alumnigroups.usc.edu/harris>, which also includes an event registration checklist, an online event submission form and a FAQ section.

### **Harris Connect Listserv**

The USCAA hosts a secure listserv, currently through Harris Connect, to enable the Club to communicate with its members. The Club president and one other individual will be provided a passcode for the listserv.

The listserv consists of all Club members who register (opt-in) for the Club online (please see the Club Sign-Up section). The listserv should be used as a basis for all communications to the Club, as it is based on the official list of members.

Clubs should not maintain their own shadow database. It is important that everyone associated with the university utilize the central USC database, to which the USCAA's records are linked. This means that if an alum updates his or her contact information with the USCAA, the update is automatically uploaded to the USC database as well. If you keep a separate database, your updates won't be linked to USC's central database, and your alumni may miss out on important university communications.

If your Club has been maintaining a separate database, please forward (in Excel) any updated information you have to your staff liaison so we can add the information to USC's central database. This helps ensure that alumni stay connected to USC.

Occasionally, the USC Alumni Association utilizes the listserv for sending important information via e-mail blasts to Club members. Otherwise, no outside entity or third party has access to this database. As long as Clubs employ the listserv for communicating with their members, the Club's e-mails should not be impacted by spam filters or regulations.

If a person wishes to unsubscribe to a Club's listserv e-mails, they will find instructions for doing so at the bottom of each e-mail.

### **Paper Mailing**

When it comes to communications outreach, e-mail is, of course, greatly preferred over snail mail, which costs much more in both labor and materials. Generally, should an Alumni Club opt for sending out an announcement or invitation by mail, the Club would need to pay for it. In certain circumstances, however — for example, a high-profile event — the USCAA might provide financial (and manpower) assistance. Whenever Club leadership feels that snail mail is the way to go, they should contact their USCAA staff liaison. He or she may be able to help you obtain a bulk mail permit or take advantage of the university's nonprofit rate by mailing your materials through the USC mailing center (domestic Clubs only).

A Club may also enlist the aid of an outside vendor to help with a mailing, provided that the vendor is university approved. The USCAA could then directly provide the vendor with the electronic mailing list for one-time use only. Again, contact your USCAA staff liaison if you are considering this option.

### **Club Surveys**

Alumni Clubs occasionally survey members to gauge interest in programming and solicit feedback. Please contact your Alumni Club liaison to explore which online survey tool will best meet your needs.



## **Social Media**

### **Overview**

Given the ubiquity of social media on the web, it's important for USC Alumni Clubs to maintain a presence on social media platforms. Social media enables the Club to reach more alumni in a given region through channels that are faster, easier and cheaper to use than the traditional printed brochure or standard web page.

However, presence does not equal strategy. Social media is not intended to replace traditional means of communication; it should supplement them. To that end, use of social media should always be goal-oriented. Keep in mind that there are many types of social media and each has a different purpose. Twitter provides instant updates; LinkedIn promotes professional networking. Facebook allows people to connect in an informal setting; Flickr, Photobucket and Shutterfly host images; Tumblr, Reddit and Digg promote other web pages; the list goes on and on...

It's easy for a Club to get lost in all these different options and wind up spinning its wheels trying to do too much on too many platforms. For the majority of any given Club's communications needs, the three main social media platforms should suffice: Facebook, Twitter and LinkedIn (strategies for using these platforms are outlined below). Of course, use of other social media is encouraged. Just remember to develop a clear communications goal first — then choose the appropriate social media platform to help achieve it.

You can find a list of USC Alumni Club social media links at <http://alumni.usc.edu/groups/social.html>. This webpage serves a dual purpose: it helps alumni find Clubs online and connects the Clubs with the USCAA and each other. The more synergy that's created between Club and USCAA social media platforms, the more effective those platforms become.

## **Facebook**

The USC Alumni Club presence on Facebook is a conglomeration of groups and fan pages. Of the two, groups are more appropriate for Alumni Club use. A Facebook group represents a quantifiable group of people – for example, USC alumni living in the New York area. Since fan pages are far broader in scope, they are more appropriate for large organizations (like the USCAA itself) to use.

Using groups has an immediate advantage for Alumni Clubs — group members can be mass e-mailed with one easy click. Currently, there is no way to send a direct message to all of a fan page’s followers. Consequently, when a USC Alumni Club has an event, Club leaders can quickly and efficiently promote the event to all Club members through Facebook.

Facebook Strategy Outlined:

1. Basic requirements for a USC Alumni Club Facebook presence:
  - a. A USCAA-approved logo (logo review helps avoid “X-Ray Tommy” and other incorrect or inappropriate uses of USC’s graphic identity)
  - b. Links to the USCAA website and to the USCAA Facebook fan page (these links lend legitimacy to the Club)
  - c. Brief description of the Club and its purpose; list of Club officers; and Club contact information (all useful information to users)

Clubs may also want to use the mass e-mail function of Facebook to send out a Club newsletter. However, take caution when determining the newsletter frequency. As a general rule, a monthly newsletter is ideal, supplemented by event-specific updates as necessary.

Alumni Clubs also need to maintain a consistent level of activity on their Club Facebook pages through uploaded photos and wall posts. The more activity on the page, the more likely this activity will show up in group member newsfeeds, effectively boosting the group’s exposure to prospective members.

Additionally, whenever anything is posted on the group wall, a follow-up post should be made as soon as possible by an admin or Club member. Following up lets group members know that their contributions are being read and creates a more social atmosphere on the group wall.

## **Twitter**

Twitter creates instant dialogue between the Club and its members/followers. Designed to promote both the mundane and the important, Twitter sends an instant broadcast to followers, who can then reply or “re-tweet.” When your Club has a Twitter account, simply notify contact @USCAumni (the USCAA Twitter address) and the USCAA will promote the new Club account to all of its Twitter and Facebook followers (more than 1,200 Twitter followers and 11,000 Facebook fans).

### Twitter Strategy Outlined:

1. Follow @USCAumni and as many USC-related accounts as possible;  
@USCAumni maintains Twitter lists of Alumni Clubs, campus organizations and other USC “Tweeters”
2. Tweet often and re-tweet USC-related information
  - a. Hash tag events
  - b. Create unique #hashtag for each event
  - c. Promote hash tag two weeks prior to the event
  - d. Encourage attendees to tweet from event using specific hash tag

The hash tag (#) creates a sort field within a Twitter feed that allows users to follow one particular topic. For example, @USCedu used the hash tag “#Nikias” to promote and track live tweets during the inauguration of President C. L. Max Nikias.

## **LinkedIn**

LinkedIn is a powerful networking tool for the professional world. Organizations generally maintain ‘groups’ as a forum to post jobs, business-related discussions and promotions. A unique facet of LinkedIn is that the administrator’s involvement is usually not content-based. That is to say, LinkedIn practically runs itself, as group members post job opportunities and business articles and contact each other. But even though group members generate more than enough content to keep the group active and relevant, the administrator must still be diligent about removing spam posts, moderating discussions and promotions, and accepting new members.

The USCAA’s LinkedIn group has approximately 20,000 members! Membership is restricted to USC alumni, faculty/staff and job recruiters. While some USC Alumni Clubs maintain their own independent LinkedIn groups, the goal is for all Clubs to maintain their own groups to provide location-specific jobs and other content to group members.

### **LinkedIn Strategy Outlined:**

1. USC Alumni Club representative should create a LinkedIn group
2. Alert USCAA group admin which Club you represent
3. USCAA group admin will link to Club group both on the USCAA website and USCAA LinkedIn Group page
4. Club admin should moderate group discussions for content and remove spam
5. Post job listings and discussions when possible

## **University Talking Points**

Every quarter, USC and the USC Alumni Association update “talking points,” highlighting the latest facts and figures on everything from academic achievements to campus enhancements to enrollment statistics. Useful for addressing fellow alumni, friends of the university and prospective USC students and their families, these talking points also distill key messaging about major university and USCAA initiatives. Alumni Club leaders will be notified via e-mail when the latest talking points are available.



# **LEADERSHIP**

### **Who runs an Alumni Club?**

A Club Executive Board includes the offices of President, Immediate Past President, President-Elect or Vice President(s), Secretary, Treasurer and your USCAA staff liaison. A Club must have the minimum number of officers constituting its Executive Board. Along with committee chairpersons and demographic or organizational representatives, the larger group constitutes the Club Board. Typical committee chairs include: SCend Off, Weekender, Scholarship, Membership, Communications, Game-Watch and Events. Representatives might include those for Parents, Young Alumni, Second Decade and Half Century Trojan programs as well as representatives for specific schools or geographic areas.

### **Succession Planning**

Club leaders should engage continually in succession planning – identifying, training and motivating new leaders.

- Utilize open house events, club surveys and open board meetings to identify potential leaders .
- Conduct yearly leadership retreats and encourage your board to take advantage of USCAA resources to train new leaders; resources include the Alumni Leadership Conference and special training sessions for scholarships, SCend Offs, etc.
- Motivate new leaders by assigning them responsibilities applicable to their positions; in the beginning, have experienced board members shadow or co-direct events to provide guidance.

Executive Board members may serve in a position for one or two years, with a two-year limit on each position. No officer may serve more than four years in a position. Term limit exceptions may be approved by the USCAA upon request by the Club Executive Board, and only the current term of an officer in 2011-12 shall count toward the position term limits. (Note that a one-year president in a Club with a president-elect may serve an additional term upon permission of the full board.)

## **New President Check-List**

It is strongly advised that alumni clubs create a succession planning document that addresses each of the following topics to ensure consistency of leadership and provide a detailed overview of club activities and how to execute them.

- **Planning, Strategy and Administration**

- **Strategic Planning**

- Fiscal Year
- Strategic Plan
- Review your Alumni Club Charter and Appendix
- Annual Report

- **Board Member Recruitment and Retention**

- **Recruitment**: Finding and keeping dedicated and active board members is probably the most important part of the president's job. If someone isn't succeeding in their current position, it is better to confront the situation as soon as possible and agree on a path moving forward. In some cases, this will involve finding a new chair or reassigning responsibilities.
- **Roles and Responsibilities**: Create a description of board and chair positions that you can revisit when appropriate in case there's a need to change a responsibility, merge or add a position.
- **Terms and Term Limits**: Similar to the above, it is recommended that you and your board consult your Club charter document and decide upon terms and term limits for officers. Once these are established, document them in writing.
- **Filling Openings and Securing New Volunteers**:
  - Approach alumni who have expressed interest in getting involved to ask them if they're interested in taking on a new role (provided it's a good fit)
  - Include a blurb in your e-newsletter
  - Send a note to your Facebook group (particularly if a few positions are open) to advertise the openings
  - Offer to meet or schedule a call with interested parties to vet them, answer their questions and give them an opportunity to think about it
  - Give the interested parties the opportunity to speak with the current position holder and attend a board meeting to help them with their decision



- **Board Meetings**
  - Scheduling, Food
  - Secretary Duties
  - Board Meeting Prep, New Attendee Welcome
  - Agenda Items and Procedure during the Board Meeting
  - Voting

**Other Items to Address in Your Club’s Succession Planning Document:**

- **Harris System Overview**
- **Financial and Asset Management**
  - Budgets
    - Fiscal Year
    - Budgeting Process
  - Bank Accounts, Payments and Reimbursements
- **Scholarships**
  - On-Campus Account
  - Budgeting
  - Awardees and Deadlines
- **Club Inventory** (tablecloths, banners, raffle items, etc.)
  - Tracking System
- **Fundraising, Development, Merchandise**
- **Communications**
  - USCAA and Branding
    - Branding Guidelines, How to Seek Input/Approval
  - Club Logo
  - Email
    - Harris and Distribution Lists
    - Club Board Members E-mail Addresses
    - USCAA Club E-mail Address – (\_\_\_\_@alumni-center.usc.edu)
  - Club Website
  - E-Newsletter
  - Flyers
  - Business Cards
- **Events**
  - Annual/Regularly Scheduled Events
    - Board Retreat and Club Open House
    - Game-Watch Parties, Mixers, Cultural Events, Service Events
    - SCend Off (consult guidelines)

## **Elections**

Identification and/or selection of Club leadership must occur annually around June, or as soon after as possible, to coincide with the fiscal (and approximate academic) year. For the Executive Board and for as many positions as is practical, terms run from July 1 to June 30, following the university's fiscal year and allowing a summer transition in between academic years; all officer positions should be filled by August 31.

Officer positions are open to any Club members. The Club president must be elected by the Club at an open board meeting (with reasonable advance notice to the local Trojan community and specifically to the USCAA staff liaison); all other officers may be elected by the Club or designated by its president, at the executive board's discretion. The Club may be able to, and is encouraged to, reach consensus on the selection of these officers, but if a competitive election proves necessary, it should be managed by the immediate past president, outgoing president or staff liaison.

Elections should not be unduly burdensome. The USCAA recommends that individuals interested in an elected position complete a one-page statement, reviewable by any prospective voter, identifying the position in question as well as the candidate's USC affiliation; his/her volunteer experience and community service; profession; and reason(s) for interest in the position. The USCAA further recommends that such individuals have an opportunity to briefly state their case verbally to Club members before any election.

If a Club needs to make a leadership change for one of its board positions due to an illness, job relocation, family emergency, etc., the Club board may nominate someone to fill the role or recruit a volunteer to fill the position until new elections are held.

## **Board Meetings**

The Club should provide advance notice of open, regular (usually monthly) board meetings (which should be held with members in physical attendance at least quarterly to help ensure transparency and provide experience for new leaders) to help set goals, determine the status of programs and events, and evaluate follow-up reports – as well as to encourage networking, bonding and the growth of new leaders. Alternative arrangements, such as virtual or telephone meetings, may be used; many clubs utilize a hybrid arrangement – in-person board meetings with some members calling in.

We encourage Clubs to reach out to other organizations (such as the USC Marshall Alumni Association, the women’s groups or USC Athletics Trojan Clubs) by inviting their board members to attend Club board meetings. This helps groups develop good working relationships and also provides opportunities for effective cross-promotion of events.

The president may on occasion convene an executive board meeting if necessary for the efficient operation of club business or to discuss personnel matters.

The Club is encouraged to hold an annual leadership retreat to help solidify and grow connections among Club leaders, evaluate the previous year, set goals, commit to participation in key USCAA or USC events, and prepare a tentative event calendar for at least the upcoming semester. The leadership retreat will typically include the entire board as well as emerging leaders, or as many of those individuals who are able to attend, and should take place in summer or early fall, after Club leadership for the year is in place.

Board meeting agendas should be announced prior to the meetings. Minutes of board meetings, or similar records, should be maintained, with an opportunity for comment by participants.

## **Sample Alumni Club Board Meeting Agenda**

Regular Club meeting agendas vary by club. You are encouraged to adopt a model that fits the culture of your organization, though the following are characteristics common to all agendas:

- **A Welcome and General Overview of the Meeting**: Delivered by the Club president or other Club officer facilitating the meeting.
- **Introductions**: Particularly important if new members are present.
- **Discussion of Club Business**: This can be accomplished in a variety of ways. More formal agendas may have reports from Club officers and committee chairs and incorporate *Robert's Rules of Order* (with motions and voting used to propose/authorize a decision or action). Alternatively, less formal agendas may be event-driven, reviewing past events and plans for upcoming events and arriving at decisions by group consensus.
- **Floor Opened for Member Discussion**: Regardless of format, there should always be the opportunity for members to discuss new ideas or topics of interest.
- **Date, Time and Location of Next Meeting**: Even if you have regularly scheduled meetings, it is good to remind the board of this information.
- **Food/Refreshments and Networking Time**: Food and refreshments don't need to be elaborate (homemade meals and potlucks are fine) and add to the atmosphere of goodwill at the meeting. In addition, either prior to or following the meeting, the Club should build in time to allow board members to network and catch up with one another.

Club members should be actively engaged so that everyone feels they are participating. There are a number of “ice-breaking” techniques to get things rolling. The most obvious is having people introduce or re-introduce themselves. You can also have them answer a question about themselves that will make each individual more accessible to the others (e.g.: Have you done anything fun in the last week or month that you might share?). Once people at a meeting are feeling more comfortable, it's easier to get down to business.

If you are interested in additional tips about making your meetings and agendas more successful, please contact your staff liaison.

### **Dealing with Difficult Volunteers and Disagreements among Club Members**

The strength of the Club over the long term is a key hallmark of leadership. To that end, as leaders of groups that are open to all, Club leaders should be cordial with one another and strive to create a collegial environment within the Club. Any disagreements should not become personal and should be resolved with primary consideration for the Club's overall mission.

When conflicts do arise within your Club, please carefully consider your next steps. E-mail, while a convenient form of communication, is often not the proper way to discuss an issue that has created discord. According to research, people can ascertain the tone of an e-mail only 50% of the time; if your Club members are already having an emotional reaction to an issue, an e-mail can easily be misinterpreted and cause a situation to spin out of control. Instead, wait to discuss more contentious issues at your regularly scheduled board meetings. If the situation can't wait for the next meeting, a phone call is the preferred method of discussion.

If you are experiencing difficulties with one particular volunteer, consider the following methods for handling the situation:

- Set clear boundaries for discussions; volunteers need to be respectful of other people's time and feelings.
- Try to get an understanding of the volunteer's specific concerns.
- Determine if the problem might be solved by retraining the volunteer or providing one-on-one mentorship.
- Consider transferring the volunteer to a new position if their current assignment isn't the right fit.
- If they seem burned out, assist them by helping to reassign tasks to other Club members.

**If there is a concern about leadership competence or conduct, please contact your USCAA staff liaison to discuss the situation and resolve it.**

Although most volunteer leaders are dedicated Trojans who sincerely wish the best for their Club, occasionally there will be someone who's a bad fit for their particular role. Club officers may be removed by the Club's executive board or the USCAA CEO, or his or her designee, or any other authorized officer of USC, for dereliction of duty, material violations of the Club charter or for actions that a university official or the executive board believe harm or threaten to harm the university's interests or reputation.

# EVENTS

## **Alumni Club Event Planning Goals**

### **Strive for at Least One Monthly Event**

Offer a mix of activities to engage as many people as possible in a multitude of ways; consider game watches (football and other USC sports) as well as social, community service, career or professional, academic, cultural and family events. Organize and sponsor a number of major events throughout the year (requiring similar planning and execution to a SCend Off) that are challenging to the Club and compelling for the region.

### **Plan Events that Appeal to Various Generational Groups**

Engage Trojans at every stage of life. Create events focused on the interest of students, young alumni (ages 22-35), second decade (35-45), alumni celebrating significant reunions (the USCAA currently holds 10-, 25-, 30-, 40- and 50-year reunions), Half Century Trojans (all USC alumni who earned a bachelor's degree from any college or university at least 50 years ago) and parents of USC students.

### **Host Regular Activities Your Alumni Can Depend On**

Consider Club events that have either consistent dates (i.e. the second Wednesday of every month) and/or take place at consistent locations, such as networking lunches, happy hours, game watches, a speaker series, etc.

## **Event Planning Check-List**

This sample checklist may be helpful in planning a club event:

### **3 MONTHS OUT, OR AT TIME OF BOOKING**

- Create event plan (including all event details):
  - Objectives/measurables/type
  - Event theme and set-up
  - Attendance goal
  - Demographics (i.e. parents, second decade alumni, etc.)
  - RSVP method (Harris/door sales)
  - Event program and timeline
  - Budget and event ticket price
- Book site and support services (check calendar of local/university events to avoid conflicting or inappropriate dates)
- Develop task list and staff/volunteer plan
- Send letters of agreement to hotel and suppliers (*please consult your staff liaison at this stage*)
- Invite speakers and inform them about your attendees, facilities and a/v capabilities
- Develop communications and marketing plan

### **5 WEEKS BEFORE EVENT**

- Confirm menus, room set-ups and supplies in writing with your event manager
- Monitor speaker presentation development and offer assistance in reproducing any handouts
- Revisit communications plan with USCAA staff liaison; determine timing and appropriate method of communications for your event including:
  - Hard-copy invitations
  - E-blasts
  - Club listserves
  - Facebook
  - Twitter
- Order signs and printed materials
- Set up Harris page for online RSVPs and listing on <http://alumni.usc.edu/events>

### **3 WEEKS BEFORE EVENT**

- Check with your speakers regarding the progress of their presentations, a/v and logistical arrangements
- Order florals and/or décor (your staff liaison may be able to provide limited décor)
- Determine check-in process



### **1 WEEK BEFORE EVENT**

- Confirm (72 hours in advance) meal and beverage counts
- Send attendees any specific information (i.e., parking, suggested dress and other instructions)
- Compile complete master set of all handouts including speaker bios for introductions

### **DAY OF EVENT**

- Check event space one hour in advance
- Assign tasks to volunteers: check-In, greeting, Club sign-up, merchandise table

### **CONCLUDING A SUCCESSFUL EVENT**

- Complete event summary
- Send thank you notes to speakers, sponsors, volunteers, etc.
- Send electronic survey and/or thank you to event guests
- Share event summary and photos with USCAA staff liaison

*Your staff liaison can provide sample budgets and other event-planning materials upon request.*

## **Guidelines for Club Sponsorship**

Depending on the nature of the Club event, there may be opportunities for a Club leader to secure event sponsors. This may include monetary support or in-kind donations.

Procedure for procuring a Club event sponsors are as follows:

1. **Club member brings sponsor opportunity to the attention of USCAA Club liaison.**  
It is important to speak to the USCAA advisor before promising anything to a possible sponsor.
2. **Club liaison receives approval from USCAA Business Partnership department.** A company may potentially interfere with university-wide and association regulations. The business categories of all event sponsors must be appropriate for the university and not violate any university-wide sponsorship policies. Finally, many of our current partners have exclusivity clauses which makes it imperative that all sponsors be approved by the USCAA.
3. **Club member works with Club liaison to promote the sponsor as an event sponsor ONLY, not a USCAA sponsor.** This must be communicated appropriately. All marketing must be coordinated with Club liaison.

Suggestions for Club sponsor marketing may include:

- Logo and/or copy inclusion in Club e-mail, e-vite or invite publicizing event
- Club portal website exposure (logo, copy and/or click-thru)
- Flyer opportunity
- Signage
- Other on-site opportunities
- Post-event marketing opportunities

Your USCAA staff liaison can provide templates and examples of solicitation letters, sponsor level sheets and thank you letters.

Providing a discount, benefit or service to alumni is not required of event sponsors as it is with business and benefit partners, but is recommended and preferred.

**Sample Solicitation Letter**

Date

**Name**

**Company**

**Address**

**Address**

Dear NAME:

On behalf of the USC Alumni Club of \_\_\_\_\_, we would like to invite you to participate in our most exciting tradition: \_\_\_\_\_, which will take place on \_\_\_\_\_ at \_\_\_\_\_. Every year [insert number] 'SC alumni, families and friends gather together to [insert line about event]. Because so many loyal Trojans attend, we feel that your company would be a perfect partner for us on this exciting day!

Sponsor [event name] and be included in [website, registration page, welcome materials; etc.]. This will allow you to make lasting connections with this targeted group. You will also be included in all event marketing media which generates over \_\_\_\_\_ impressions. We have included a sample media summary from last year for your reference.

Please take a moment to look over the attached flyer to discover the various ways in which you may support the USC Alumni Club of \_\_\_\_\_ while simultaneously gaining exposure to the vast and tightly knit Trojan Family. Contributions over \_\_\_\_\_ will be tax deductible under USC's 501(c)(3). If you would like more information on how to partner with us at this year's event, please contact \_\_\_\_\_.

Don't miss this great opportunity to become part of the Trojan Family!

Sincerely,

[Names and Titles]

### **Club Merchandise and Collateral**

Clubs can see samples of the types of creative products currently available by visiting <http://www.uscacc.com>, the website of the Alumnae Coordinating Council, and the USC Bookstores website at <http://www.uscbookstore.com>.

If a Club is interested in developing its own product(s) to sell, there are certain procedures that must be followed. For more information, visit the USC Trademarks and Licensing website at <http://trademarks.usc.edu/campus-community> or contact your staff liaison for more details.

## USCAA Signature Events 2011-12\*

### Representation at Major University Events

The president is responsible for attending (or securing board attendance at) key annual USC events. Consult your Club charter and make sure that you and your board have added the appropriate dates to your calendars. Attending these events helps strengthen your Club's ties to the university and creates a stronger bond among board members.

|                           |  |
|---------------------------|--|
| Saturday, September 24    | <b>USC vs. Arizona State Weekender</b><br><i><a href="http://alumni.usc.edu/events/football/football.html">http://alumni.usc.edu/events/football/football.html</a></i>   |
| Thursday, October 13      | <b>USC vs. Cal Weekender</b><br><i><a href="http://alumni.usc.edu/events/football/football.html">http://alumni.usc.edu/events/football/football.html</a></i>   |
| Saturday, October 22      | <b>USC vs. Notre Dame Weekender</b><br><i><a href="http://alumni.usc.edu/events/football/football.html">http://alumni.usc.edu/events/football/football.html</a></i>  |
| Friday, October 28        | <b>Half Century Trojans Luncheon</b><br><i><a href="http://alumni.usc.edu/hct">http://alumni.usc.edu/hct</a></i>   |
| Friday, November 4        | <b>USC vs. Colorado Weekender</b><br><i><a href="http://alumni.usc.edu/events/football/football.html">http://alumni.usc.edu/events/football/football.html</a></i>  |
| Fri.-Sat., November 11-12 | <b>USC Homecoming and USCAA Reunion Weekend</b><br>Classes of 1961 (50-year), 1971 (40-year), 1981 (30-year), 1986 (25-year) and 2001 (10-year) reunions<br><i><a href="http://alumni.usc.edu/homecoming">http://alumni.usc.edu/homecoming</a> and <a href="http://alumni.usc.edu/reunions">http://alumni.usc.edu/reunions</a></i> |
| Thursday, February 16     | <b>Half Century Trojans Going Back to College Day</b><br><i><a href="http://alumni.usc.edu/hct">http://alumni.usc.edu/hct</a></i>  |
| Thursday, March 1         | <b>USC Women's Conference</b><br><i><a href="http://alumni.usc.edu/womensconference">http://alumni.usc.edu/womensconference</a></i>  |
| TBD                       | <b>USC Latino Alumni Association Gala</b><br><i><a href="http://sait.usc.edu/maaa/index.asp">http://sait.usc.edu/maaa/index.asp</a></i>  |
| Friday, April 13          | <b>USC Asian Pacific Alumni Association Gala</b><br><i><a href="http://alumni.usc.edu/apaa/events.php">http://alumni.usc.edu/apaa/events.php</a></i>   |

|                    |  |
|--------------------|--|
| TBD                | <b>USC Black Alumni Association Gala</b><br><i><a href="http://alumni.usc.edu/baa/home.shtml">http://alumni.usc.edu/baa/home.shtml</a></i>             |
| Saturday, April 28 | <b>79th Annual USC Alumni Awards</b><br><i><a href="http://alumni.usc.edu/awards">http://alumni.usc.edu/awards</a></i>                                 |
| Sunday, April 29   | <b>USC Lambda LGBT Alumni Association Lavender Commencement 2012</b><br><i><a href="http://alumni.usc.edu/lambda">http://alumni.usc.edu/lambda</a></i> |

*\*Dates subject to change.*

### **USCAA Sponsored Events and Resources**

The USCAA sponsors events around the world to connect alumni to USC. These events are often scheduled in cooperation with other campus departments and administrative units and may feature guest lecturers, visiting faculty or career planning experts.

This is your opportunity to partner with the USCAA to engage alumni in your Club's geographic region. Your staff liaison will ask that the Club assist in promoting the event by having board members bring guests (to support the event through personal endorsement and word of mouth) and by promoting the event at other Club activities. Club volunteers should offer to assist with greeting guests and registration. There is often a networking component built into these events, and you are encouraged to let guests know about your Club and its activities (bring your business cards!). Clubs may also work with their Club liaison to distribute flyers advertising Club activities or to make a short presentation during the event program.

### **Career/Networking Events**

We encourage you to host periodic career and networking events that promote USC Career Center services, maximize networking among our younger alumni and help your Club enhance its base of younger volunteers. Periodically, we team up with the Career Center to host alumni receptions around the world.

On the *Club Handbook* website, you may download a copy of the Alumni Career Events Tip Sheet. This document, prepared specifically for alumni clubs by the Career Center, provides information on how to structure programming, think through logistics and market events.

## **SCend Offs**

Each summer, USC Alumni Clubs around the world host SCend Off receptions to welcome incoming USC students to the Trojan Family. SCend Offs help connect new students, their families and friends to local alumni and alumni groups. On occasion, USC faculty or administrators attend SCend Offs to greet and welcome the new students and their families. All are welcome to attend a SCend Off in their area or, if they are traveling, wherever they happen to be. More information on SCend Offs is provided in the training manual distributed to Club leaders each January. Some highlights are:

- **Venue**: The USCAA prefers that Alumni Clubs host SCend Offs in a home of a parent, alumnus or friend of the university.
- **Invitations**: The USCAA provides contact information for current and incoming students. The Alumni Club is then free to design a flyer that the Club can mail to the students. The Club may want to consider calling students to invite them personally to the event.
- **Raffle Baskets**: As a fundraiser, the Club can put together 2-3 baskets made up of USC paraphernalia such as T-shirts, hats, license plate frames, etc. and raffle them off to attendees.
- **USC Giveaways**: The USCAA sends each Club various giveaways such as draw-string bags to offer to incoming students and other guests.
- **Food**: Depending on time of day, the Club may wish to provide cookies, soda, hot dogs, hamburgers, chips, salsa and/or some other type of refreshment.
- **Gifts to Hosts**: Clubs should, as a gesture of goodwill, give the hosts a thank you card signed by the board and a thank you gift. Examples include a USC-themed personalized serving platter, a frame with photos from the previous SCend Off, etc.
- **Admission**: Clubs may not charge incoming students and their parents to attend; other guests may be charged a nominal fee.
- **Event Program**: Typically, the Club president, SCend Off chair and/or scholarship chair and hosts will speak for a few minutes each. The scholarship chair can announce scholarship winners and ask them to stand and be recognized.
- **Photography**: Someone should be tasked with photographing the event, with pictures taken of incoming freshmen and a group shot of all guests. Clubs might also want to take pictures of their SCend Off chair, hosts, scholarship recipients, etc.

### **Game Watches and Athletic Events**

Football game-watches and game-watches for other sports are a great way to come together and foster the Trojan spirit. Generally held at a local bar or restaurant, many Clubs negotiate discounts on food or drink for USC games. Your event venue may also be able to help you promote the event through advertising at the location or by sponsoring the printing of postcards or other materials that you can send to your membership. This is also a great opportunity to raise money for Club operating funds or scholarships by charging admission (if you are hosting the event with food and/or drinks); holding drawings for USC-related merchandise or gift baskets; and asking if the venue will contribute a percentage of the proceeds to the Club to support scholarships.

If your Club is in an area where USC Athletics teams are scheduled to play, consider holding events such as pre- and post-game parties, picnics, etc.

Contact your staff liaison to arrange for tickets and group seating for non-football Athletics events, including baseball and basketball games.

In addition to USC Athletics-related events, opportunities also exist for other sports-related activities including golf tournaments, bicycle races, ski trips, softball and volleyball leagues, PAC-12 tournaments and TV game parties.

### **Social Events**

Most activities are social events in themselves. When planning your event calendar, it is important to consider the diversity of your Club membership. Programming activities to attract all potential constituent groups should be considered including singles and families.

A few suggestions:

- |                     |                                   |
|---------------------|-----------------------------------|
| Beach Party         | Holiday Party                     |
| Boat Trip           | Luncheon, Dinner                  |
| Brewery/Winery Tour | Picnic                            |
| Casino night        | Ski Trip                          |
| Cooking Classes     | Swim Party                        |
| Day at the Races    | Volleyball/ Bocce Ball Tournament |
| Happy Hours         | Zoo Trip                          |



### **Cultural Events**

We encourage clubs to partner with local cultural organizations to offer alumni such diverse events as the following:

- “USC Night” at the symphony and theater performances
- Museum/institute tours
- Visits to contemporary or traditional art galleries
- Visits to local private or public universities
- City hall tours
- Capitol tours (e.g., in Sacramento, California)
- Visits to major city parks (i.e. Central Park in NY)

Here are some helpful tips in planning a cultural event:

- Research local cultural events and coordinate calendars
- Allow six to nine months for proper event planning and contact your staff liaison to discuss ideas
- Contact a venue representative to discuss event opportunities , especially a pre- or post-party with a performer, artist, director, conductor, etc.
- Consider fundraising elements to support your Club operating expenses and/or scholarships
- Effectively promote the event through local mediums, Club *listserv*, etc.

Contact your local chamber of commerce or convention and visitors bureau to inquire about other interesting cultural attractions such as traveling art exhibits, concerts and continuing education tours that might translate into effective events.

### **Generational Group Events**

Consider programming that targets populations through the generational lens, e.g., current students, recent graduates (from the last 10 years), second decade graduates (30-somethings), Baby Boomers and Half Century Trojans. Make use of other USC alumni organizations focused on these groups.

### **Parent Programs**

We encourage Clubs to host at least one parent event each year. This could be a wine tasting or mixer, a parents tea or outing. Whether the event is strictly parent-focused or one that may simply appeal to USC parents, let your staff liaison know so we can promote it in the monthly USC Parent Programs newsletter. More information on parent programs and resources can be found at [www.usc.edu/parent](http://www.usc.edu/parent).

### **Alumni Leadership Conference and Volunteer Recognition Dinner**

Join fellow USC volunteers and alumni group leaders each fall for the USC Alumni Leadership Conference, when hundreds of alumni leaders from across the nation and around the world return to campus to fortify their leadership skills, exchange ideas and strengthen their Trojan Family ties. The USC Alumni Association welcomes volunteer leaders and staff from the university's alumni organizations -- including regional Clubs; women's, generational and multicultural groups; school-based organizations; and USC Athletics groups. All actively serving Alumni Club board members are encouraged to attend.

### **Awards Programs**

The Club president (with input from Club board) is responsible for making or coordinating any nominations for USCAA-sponsored awards and recognition programs.

### **Volunteer Recognition Awards**

- Held in conjunction with the Alumni Leadership Conference in the fall, nominations are typically due in June.
- *The Widney Alumni House Award* recognizes volunteers for their loyalty, support and dedication to the university and the Trojan Family. Volunteers can only win this award once.
- *The Volunteer Organization of the Year Award* recognizes USC alumni organizations or Clubs for their extraordinary efforts to engage USC alumni lifelong and worldwide and build a culture of philanthropy among the Trojan Family. Organizations can only win the award once in a three-year period.
- *The Volunteer Friend of the Year Award* recognizes a USC faculty or staff member for their outstanding support to alumni volunteers in their work.
- *The President's Award* recognizes a volunteer's extraordinary leadership, service, achievement and overall contributions to USC.



**ALUMNI CLUB  
SCHOLARSHIP PROGRAM**

### **2012-13 Scholarship Program**

The USC Alumni Association and its related entities award more than \$2 million in alumni scholarships to continuing students each year. Individuals must apply for scholarships during the academic year prior to the year of funding. Applications received by the February 1, 2012 deadline are for scholarships during the 2012-13 academic year. Alumni scholarships are for tuition only. Students receiving full tuition benefits from tuition remission, trustee scholarships, athletic scholarships or other sources are not eligible for an alumni scholarship award.

### **ONLINE ALUMNI SCHOLARSHIP APPLICATION:**

<http://alumni.usc.edu/students/scholarships/>

#### **Alumnae Scholarships**

Awarded annually to continuing students by USC alumnae groups throughout Southern California. Each group has specific criteria for eligibility based on leadership experience, home region and/or class year. Recipients must reapply each year.

#### **Alumni Club Scholarships**

Awarded annually to continuing students by USC Alumni Clubs around the country. Alumni Club scholarships are merit-based. Recipients must reapply each year.

#### **SCions Scholarships**

Awarded annually to new and continuing students by the USC Alumni Association. Applicant must be the son, daughter, grandchild, great-grandchild or sibling of a USC alumnus/a. Current SCions scholarship recipients do not need to reapply each year as long as they maintain a 3.0 cumulative GPA.

For other scholarship information and applications, please visit the websites listed below:

#### **Asian Pacific Alumni Association Scholarships**

<http://alumni.usc.edu/apaa/scholarships.php>

#### **Black Alumni Association Scholarships**

<http://alumni.usc.edu/baa/scholarship.shtml>

#### **Half Century Trojans Scholarships**

<http://college.usc.edu/half-century-trojan-scholarship/>

#### **Lambda LGBT Alumni Scholarships**

<http://alumni.usc.edu/lambda/scholarships/index.html>

#### **Mexican American Alumni Scholarships**

<http://sait.usc.edu/maaa/newsite/pages/members/students/scholarship.asp>

#### **Town and Gown Scholarships**

[www.townandgownusc.com](http://www.townandgownusc.com)

**Note:** *Scholarship interviewing tips and sample scoring sheets are available upon request.*

### **2012-13 Scholarship Timeline**

October 1, 2011                      The Alumni Scholarship Application will be available to returning undergraduate students via the USCAA website.

Early December 2011              Presidents and/or scholarship chairperson will receive number of applications received thus far. Based upon this number, organizations will decide how many scholarships they will award for the 2012-13 school year.

December 5, 2011                    Scholarship training for Club presidents and/or scholarship chairpersons

Mid December 2011                 Fall scholarship statements distributed to presidents and or scholarship chairperson

Contact:                                 Alexander Barrera  
(213) 740-5944 or [alexander.barrera@usc.edu](mailto:alexander.barrera@usc.edu)  
USC Alumni Association  
3607 Trousdale Parkway, TCC 305  
Los Angeles, CA 90089-3106

**PLEASE NOTE:** It is the responsibility of the president and scholarship chair to share this information with the Club treasurer in a timely manner to ensure payments are made to the USC Alumni Association.

January 10, 2012                    Presidents and/or scholarship shairpersons will receive an update on the number of applications received thus far. Based upon this number, organizations decide how many scholarships they will award for the 2012-13 school year.

January 17, 2012                    Scholarship payments (pre-fund) for 2012-13 must be received by the USCAA.

Please submit a check for the full amount made payable to “The USC Alumni Association” to:

Alexander Barrera  
USC Alumni Association  
3607 Trousdale Parkway, TCC 305  
Los Angeles, CA 90089-3106

**ORGANIZATIONS THAT FAIL TO PAY THEIR SCHOLARSHIP COMMITMENTS FOR THEIR 2012-13 AWARDS AS WELL AS ANY PREVIOUS BALANCE WILL HAVE THEIR SCHOLARSHIP ASSETS FROZEN AND NOT BE ALLOWED TO AWARD THE FOLLOWING YEAR.**

Any unused portion of scholarship funds deposited for the 2012-13 season will remain in the organization's on-campus scholarship account and will be reflected on the December 2012 scholarship statement.

**PLEASE NOTE:** It is the responsibility of the president and scholarship chairman to share this information with the organization treasurer in a timely manner to ensure payments are made to the USC Alumni Association.

Late January 2012

Once your organization's 2012-13 pre-fund has been received, the Club presidents and/or scholarship chair will receive a link, log-in and password to view scholarship applications on the Scholarship Administration secured website at [www.wufoo.com](http://www.wufoo.com).

**February 1, 2012**

**USC Alumni Association Scholarship Application Deadline**

USCAA scholarship applications must be submitted online by 11:59 p.m. Wednesday, February 1, 2012. Late, mailed, or faxed applications will not be considered. Applications are available at <http://alumni.usc.edu/students/scholarships>.

February – March 2012

**Interview Period for Returning USC Students**

In-person interviews are not mandatory. For those groups outside of Southern California, interviews may be conducted by phone, e-mail or through other means. These methods are also helpful when considering current students who are studying abroad for the spring semester.

Please plan accordingly -- students are on spring break during the week of March 12-16.

**PLEASE NOTE:** Organizations may not award incoming freshmen, trustee scholars and/or students receiving tuition assistance. Organizations may consider any other current USC student who is **not** receiving full tuition benefits.

April 6, 2012

Deadline to submit the Scholarship Nomination Form (which includes the list of students that your organization would like to award for 2012-13).

You may submit your Scholarship Nomination Form at any time once you have completed your interview and selection process.

**THE FORM IS AVAILABLE ONLINE ON THE SCHOLARSHIP ADMINISTRATION WEBSITE AND IS DUE BY APRIL 6, 2012 WITH ABSOLUTELY NO EXCEPTIONS.**

**LATE NOMINATION FORMS WILL NOT BE CONSIDERED, WHICH WILL RESULT IN YOUR ORGANIZATION NOT AWARDING SCHOLARSHIPS THE FOLLOWING YEAR.**

You will receive an e-mail confirmation of your submission. Please keep this for your records and allow up to two weeks for a response.

**PLEASE NOTE:** The USC Office of Financial Aid (FAO) reviews and applies all awards to students. This information is returned to USCAA and then to the Club scholarship chairperson.

Also note that this is a very busy time for Admissions and Financial Aid. In addition to the alumni scholarship program, these offices are coordinating admissions and financial assistance to several thousand students in association with departments and programs university-wide.

We truly appreciate your patience and will do our best to respond to your nominations in a timely manner. Please allow up to 3-4



weeks for a response from the time you submit your nomination form.

Early May 2012

Final list of approved recipients sent to scholarship chairpersons

Each organization may contact its award recipients by phone, mail, or e-mail regarding the intended award once the award has been approved by FAO and the USCAA.

Sample notification letters and commitment forms are available on the Scholarship Administration website. The samples are for your reference; your letters and forms need not be submitted to the USCAA.

Late May 2012

Spring scholarship statements distributed to presidents  
And/or scholarship chairpersons.

July 15, 2012

All awards are final. Chairperson may not submit any additional names or alternates after this date. Any unused portion of scholarship funds will remain in the on-campus scholarship account and will be reflected on the December 2012 scholarship statement.

# **FINANCES**

### **University Federal Tax-ID Number and Usage**

U.S.-based Alumni Clubs are allowed to use USC's 501(c)(3) Federal Tax Identification Number, with permission. 501(c)(3) status is used by not-for-profit organizations that meet the federal exemption requirements. Contact your staff liaison for further details.

### **Club Bank Accounts**

Alumni Clubs are encouraged to establish a club checking account to securely maintain funds used to sustain the club's operations.

To maintain an alumni club bank account, the following are the minimum requirements:

- Authorized signers on each bank account must include the club's *current* President and Treasurer, and an official representative of the University of Southern California.
  - A club bank account must be supervised because they become part of the University umbrella and must follow its system of fiduciary checks and balances.
- A new signature card must be completed within 30 days of the succession of new leadership.
- A copy of the current signature card may be requested by the USCAA.
- At least once a year (during the chartering process), the USCAA will request a copy of monthly or quarterly statements from the financial institution holding the account.

It is strongly recommend that alumni clubs open an account with the USC Credit Union. They provide a high level of service, make recordkeeping a great deal easier for all parties involved and are the only financial institution dedicated to serving the Trojan Family.

To open a USC Credit Union account, please follow these steps:

- Fill out the **Membership Account Application and Agreement** (available in the forms section) with the required information and signatures for all signers.
  - No faxed documents are allowed; forms must be originals or scanned.
  - Ignore the SS-4 form, as you will use the University's Tax ID # provided by your staff liaison
- Provide TWO forms of ID for account signers – passport and driver's license is ideal
- Provide Social Security Number for account signers to your USC Alumni Association staff liaison

- Once your USC Alumni Association Staff Liaison has collected all of this documentation, allow 3 to 4 weeks for the account to be activated.

To change the authorized signers on a USC Credit Union account, please follow these steps:

- Fill out the **Application to Change Authorized Signers** (available in the forms section) with the required information and signatures for all signers.
  - No faxed documents are allowed; forms must be originals or scanned
- Provide TWO forms of ID for account signers – passport and driver’s license is ideal
- Provide Social Security Number for account signers to your USC Alumni Association staff liaison
- Once your USC Alumni Association Staff Liaison has collected all of this documentation, allow 3 to 4 weeks for the account to be updated.

### **Online Registration (Harris Connect) Payment Processing**

After an event has occurred, please contact your USC Alumni Association staff liaison to request the process payment from the Harris event system to the account designated by the Alumni Club. Funds can be transferred via check to be placed in the Alumni Club’s operating checking account or transferred to the Alumni Club’s University Scholarship Account – or a combination of both.

Please allow 4-6 weeks for the check to be cut and/or the funds to be transferred into the University Scholarship Account.

### **PayPal Usage**

If USC Alumni Clubs wish to collect funds and use the USC Federal Tax ID number, they must use the Harris website. PayPal and other outside companies cannot be used, **unless** the club is willing to use their own tax ID number and pay any associated income taxes



# **USCAA PARTNERSHIPS AND BENEFITS**

## **USCAA Business Partnerships and Benefits Overview**

The University of Southern California Alumni Association (USCAA) currently offers two standard types of affinity opportunities – Business Partnerships and Event Sponsorships. USCAA will occasionally consider corporate affinity relationships that do not directly fall into any of the above categories. These opportunities are evaluated on a case-by-case basis.

### **Business Partnerships Overview**

USCAA currently offers business partnership levels at varying price points, and evaluates and selects partnership programs that promote quality products and services, provide value and benefits to alumni and provide sustainable revenue for Association's programs. Partnership proposals and contracts are reviewed by the CEO of the Alumni Association, Executive Director of Alumni Relations, Associate Director of Business Partnerships, the university's Director of Trademark and Licensing and the University Counsel's office. The Board of Governors Business Partnerships Committee also act as an liaisony role on business partnership proposals.

Business partnerships must include the following:

- A unique product, service or opportunity. The partnership program must provide an exclusive opportunity and offer a bona-fide member discount or benefit. Benefits are carefully chosen based on the following stringent criteria:
  - True value for alumni
  - Unique opportunity
  - Reputation enhancing
  - Low nuisance factor
  - Appropriate for the university
  
- Proposed annual marketing schedule, including advertising, sponsorship of major alumni activities or events, and other ancillary marketing support.
- Products must be provided to the USCAA in advance for quality approval before being marketed to alumni.
- Expected USC alumni participation rates and revenue guarantee.
- References and success rates from other accredited universities.

### **USCAA Event Sponsorships Overview**

The USCAA currently offers sponsorships for many of its signature events and is actively expanding sponsorship opportunities for generational and multicultural events as well. The benefits of sponsorship vary by event and are offered at a variety of price points. Most event sponsorships offer the sponsor face time (e.g., a table or tent) with alumni at the event itself. In addition, an event sponsorship will often include event-related publicity for the sponsor including:

- Logo and/or copy inclusion in e-mail, flyer and/or invite publicizing event
- Website exposure (logo, copy and/or click-thru)
- Signage
- On-site opportunities
- Post-event marketing opportunities (e.g., “thank you” ad in *Daily Trojan*)

Providing a discount, benefit or service to alumni is not required of event sponsors as it is with business and benefit partners, but is recommended and preferred. The business categories of all event sponsors must be appropriate for the university and not violate any university-wide sponsorship policies.



## Current Alumni USCAA Benefits & Partnerships

Below is an overview of our current affinity partners. These partners promote quality products and services, provide value and benefits to alumni, and provide sustainable revenue for USCAA programs. To learn more about each benefit, or to see the most up-to-date list, please visit <http://alumni.usc.edu/benefits>.

### Premier Partners

**Bank of America**



- USC partner as well as USCAA partner
- Benefit: Holders of USC checking and credit card accounts can earn rewards, sign up for the *Keep the Change* savings program, and receive USC-branded checks, credit cards and debit cards.
- Scope: National



- Benefit: USC alumni are eligible to receive discounts on memberships for FreeCreditScore.com™ and ProtectMyID™ offering world-class credit and identity protection.
- Scope: International



- Benefit: Offers a substantial alumni discount on auto and homeowners insurance.
- Scope: National

**MARSH**

- Benefit: Offers USC alumni the opportunity to join a USC group insurance plan for discounts on a wide range of insurance including medical coverage, term life, auto, homeowners, catastrophe major medical, short-term medical, long-term care and even pet insurance.
- Scope: National



- Benefit: USC alumni are eligible for 10% off registration costs on most executive and management education programs for mid-career professionals including in-house executive leadership institutes, management development programs and courses that develop functional skills.
- Scope: Southern California local for physical presence in the classroom, or online classes for other national and international alumni.



- Benefit: USC alumni are eligible for the “Friends and Family” plan under which, in addition to receiving competitive interest rates, all standard lender fees (including processing, underwriting and document preparation) are waived resulting in an average savings of \$1,000 to \$2,000 per loan for purchasing or refinancing primary residences, second homes, investment properties, etc.
- Scope: Regional (Southern California)



UNIVERSITY GATEWAY

- Benefit: USC alumni who refer students who sign a lease at University Gateway (a luxury apartment complex across the street from USC’s main campus) receive a free 5-night cruise for two.
- Scope: Benefit is national and international though the apartments are local to the USC main campus area.

## Supporting Partners



- Benefit: Alumni receive a substantial discount off their car rental (full-size and below) as well as unlimited mileage within the state (and sometimes neighboring states) with no surcharges for an additional driver; most city surcharges waived; and, in some cases, an eliminated or reduced drop fee (Enterprise also has an on-campus student discount program for Trojans currently pursuing their undergraduate degrees).
- Scope: National



- Benefit: Alumni residents at two retirement communities, The Canterbury (Rancho Palos Verdes) and The Covington (Aliso Viejo), receive 5% off the entrance fee, plus 50% off the monthly fee for three months (after 90 days of residency); those at the MonteCedro (coming soon to Altadena) will receive a \$2,500 move-in credit to use for upgrades plus 50% off the monthly fee for six months (provided they move in within 60 days of The MonteCedro's opening).
- Scope: Regional (Southern California)



- Benefit: Alumni receive 20% off select membership packages (including free museum admission for one year and preferred ticketing to museum-hosted programs, events and performances) to enjoy cutting-edge exhibits, interactive experiences and exciting live performances.
- Scope: Regional (Southern California)

# JAGUAR

- Benefit: USC alumni receive exclusive special offers depending on the type of car – \$2,000 off their purchase and/or the opportunity to purchase the vehicle at dealer cost instead of MSRP; \$500 donation goes to the USCAA per vehicle sold.
- Scope: National



- Benefit: USC alumni receive up to 30% off the best available rate at this Trojan-owned boutique hotel chain which includes Treasure Island in Las Vegas, the Beacon Hotel in Miami Beach and the Ambrose in Santa Monica.
- Scope: International



- Benefit: USC alumni receive 10% off all pre-college test preparation programs (PSAT, SAT, & ACT Classroom, Live Online, Online, and Private Tutoring courses) \$999 or above, and graduate programs (GMAT, GRE, LSAT, MCAT, DAT, OAT or PCAT Classroom On Site, Classroom Anywhere, On Demand, and One-On-One courses) \$1,100 or above.
- Scope: National



- Benefit: USC alumni receive a \$50 Target Gift Card when they open a ScholarShare 529 College Savings Plan account and sign up for automatic investing of at least \$50 per month.
- Scope: Regional (state of California)



- Benefit: USC alumni receive value-added services such as special discounts, a personal move coordinator, competitive rates, preferred pick-up and delivery dates, and claims settled in 30 days or less.
- Scope: International



- Benefit: In addition to federal, state and local solar rebates, USC alumni get an additional rebate of up to \$1,750 on the purchase of a SunPower solar system offering more efficiency and 50% more power than other brands.
- Scope: Regional (California)



- Benefit: Exclusively comprised of Trojan Family members, this nonprofit bank gives back to its members in the form of better rates and low or no fees.
- Scope: Local (greater Los Angeles area) with ATMs available nationally



- Benefit: Healthcare for Trojans, by Trojans, at USC University Hospital (a private, acute-care facility offering some of the most sophisticated technology available in a personal, private setting) and at USC Norris Cancer Hospital (affiliated with the USC Norris Comprehensive Cancer Center, one of the original nine such centers designed by the National Cancer Institute).
- Scope: Local (greater Los Angeles area)



- Benefit: Wherever they travel, USC alumni receive special rates and access to 24/7 emergency assistance.
- Scope: International



- Benefit: With a USC Alumni Discount Certificate, Trojans can save up to 20% off the Wedding Collection package from this USC Hospitality program offering diverse venues and culinary services to the university community.
- Scope: International, but offer only redeemable for an on-campus wedding

Again, these partners promote quality products and services, offer value and benefits to alumni and provide sustainable revenue for USCAA services and programs.