



# Volunteer Leadership Orientation

**July 28, 2022**  
**4:30-6:00 p.m.**

Name, Network & Pronouns



**Welcome!!!!**

# AGENDA

- CAAA Welcome
- Introductions
- Roles of CAAA
- Network Registration
- Network Budgets
- Event Planning



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# AGENDA

- Marketing, Communications and Social Media
- Network Collaboration
- Professional Development and CAAA Activities
- Principles of Community
- Challenges and Successes



**Introductions!**

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# Network Leader Introductions

- Name
- Network
- Pronouns
- What are two reasons you volunteer as a network leader?

Breakout rooms:

What events are you planning?

What event ideas do you have?

What are some of your hurdles?





# Roles at CAAA





**Dana Allen**

Assistant Vice  
Chancellor &  
Executive Director  
of the Cal Aggie  
Alumni  
Association



**Paul David Terry**

Assistant Director  
of Alumni  
Engagement



**Ashley Pelham**

Assistant Director  
of Alumni  
Engagement



**Pauline  
Moreira**

Associate  
Executive  
Director & Chief  
Programs  
Officer



**Erin Mross**

Assistant Director  
of Parent and  
Student  
Engagement



**Christina  
Cadang**

Assistant Director  
of Alumni  
Careers



**Mary Jo Ford**

Director of  
Business  
Partnerships, Wine  
and Travel  
Programs



**Jasmine Herrera**

Assistant  
Executive Director  
of Alumni  
Relations & Senior  
Revenue  
Generation Officer



**Divine Otico**

Assistant Director  
of Membership



# History



# Board of Directors

## President



**Scott Judson '09, JD '12**

## Vice President/President-Elect



**Anu Johl Singh '04**



## United States Networks

- › [Arizona](#)
- › [Central Valley](#)
- › [Chicago](#)
- › [Colorado](#)
- › [Davis](#)
- › [East Bay](#)
- › [El Centro](#)
- › [Fresno](#)
- › [Hawaii](#)
- › [Los Angeles](#)
- › [New England](#)
- › [New York](#)
- › [North Carolina](#)
- › [Orange County](#)
- › [Oregon](#)
- › [Sacramento](#)
- › [San Diego](#)
- › [San Francisco](#)
- › [Seattle](#)
- › [Silicon Valley](#)
- › [Texas](#)
- › [Yolo County](#)
- › [Washington, D.C.](#)



## International Networks

- › [Chile](#)
- › [China](#)
- › [France](#)
- › [Hong Kong](#)
- › [India](#)
- › [Japan](#)
- › [Mexico](#)
- › [Singapore](#)
- › [Taiwan](#)
- › [United Kingdom](#)



## Special Interest and Affinity Networks

- › [Active Aggies](#)
- › [African and African American Alumni Association \(5A\)](#)
- › [Cal Aggie Lambda Alumni Association \(Lambda\)](#)
- › [Chicanx Latinx Alumni Association \(CLAA\)](#)
- › [Chorus Alumni Network](#)
- › [Iranian Alumni Association](#)
- › [Native American Alumni Association](#)
- › [Military Alumni Network \(Mil-Net\)](#)
- › [Rugby Alumni Network](#)

# Being a Leader

- Participate in planning and strategy meetings with other network leaders, supporters, and CAAA staff.
- Plan and host in-person and/or virtual Aggie pride, educational, career development and network, and community service events
- Manage a small programming budget
- Ambassador for the university
- Collaborates with CAAA on alumni needs.
- Promote the UC Davis Principles of Community
- Recruit additional network leaders and supporters.
- Partner with UC Davis on special events
- Serve as a point of contact to answer questions
- Opportunity to serve on a CAAA Board of Director committees.
- Support Facebook and social media efforts.



# Network Registration

# Network Registration

- [Network Registration Instruction Worksheet](#)
- [Terms and Conditions Form](#): Each network leader is required to read and sign the terms and conditions form as part of the network registration and continued compliance for the group.
- [Bylaws Template](#): A sample bylaws is available for groups to help establish guidance within the Cal Aggie Alumni Association Board of Governance.

\*Each alumni leader must have a current annual or lifetime membership\*

# 2022-2023 Network Registration Breakout Rooms

Network Leader Resource Page

<https://bit.ly/caaanlr>

- Network Registration
  - one per network
- Terms and Conditions
  - one per network leader
- Membership Reminder
  - current annual or lifetime
- Budget Discussion
- Event Planning & Annual Requirements
- Questions?

**Register by April 30, 2023!**



# Network vs Supporter

All groups must register annually whether they are at a network or supporter level. Colloquially, both will still be referred to as Networks. The difference in designation will impact budgetary allocations only.

## Network

- Host four total events, least one event of each theme, between July 2022-June 2023.
- Maintain a minimum of three Network Leaders.
- Provide at least two network planning meetings.
- Have 1,000 alumni or more in your network.
- Complete the CAAA Annual Network Registration.

## Supporter

- Host at least one event in the fiscal year.
- Maintain at least one Network Leader.
- Complete the CAAA Annual Network Registration.



# List of Network Leaders

List everyone who will be volunteering as part of the network this year. All volunteers on this list must complete the separate Terms and Conditions page.

One person should be designated to serve on the CAAA BOD Chapters Committee.



# Point of Contact

You **must** designate one, and up to three, network leaders as a point of contact. They are responsible for:

- Managing the budget.
- Meeting at least twice a year with your CAAA Liaison.

If there is only one volunteer for your Network and you are at the Supporter level, you are **by default** the point of contact.



## Terms and Conditions form

- All solicitations (business, gifts, contracts, catering, cash, tickets) must be pre-approved by Cal Aggie Alumni Association and Development and Alumni Relations.
- Contact CAAA prior to using university branding as it relates to events and activities with CAAA, AAR, UC Davis Strategic Communications and DEVAR marketing and Communications.
- Networks are not permitted to influence legislation or participate or intervene in activities on behalf of any candidate for public office unless direction from UCOP and UC Davis is given.



## Planned Activities: **Events**

- Event Types: Aggie Pride, Educational, Careers and Volunteerism
- Network Leader Event Guide

# Budget: What CAN'T you spend your money on?

*CAAA will not be able to reimburse you for any purchases of these items. When in doubt - ask your Staff Liaison!*

- Alcohol
- Physical Items for an event
- Leader stewardship (monetary award, gift cards, recognition, cost of leader to attend an event)
- Planning meetings

# Statement of Philanthropy

- Supporting UC Davis through fundraising or increasing awareness about fundraising efforts
- Give Day
- CAAA Scholarships



# Social Media



- Current Leaders - List all Network Socials and passwords
- New Leaders - You will be given access to any existing Social Media Accounts
- **New and Current Leaders** - Indicate if you would like to start a new social account so we can work with marketing to see how to open it.
- Groups VS Pages



# Network Budgets



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# Network Budgets

## Registered Networks

Full Networks: \$500.00

Supporters: \$250.00

Networks that registered by the deadline will receive an additional \$100.00

- Based upon registration submissions
- Use the Pre-event form for budget request
- Collaborate with CAAA Liaison
- Submit with pre-event form
- We have multiple events and requests, earlier the better - avoid delays

# Network Budget Guidance

- Expenses from budget must be pre-approved by CAAA
- Budgets do not roll over
- Contracts need to be signed by CAAA
- If alcohol is served, food needs to be served at the event and needs to be pre-approved.
- No cash handling.
- What you can't spend your budget on:
  - Alcohol
  - Physical items
  - Leader stewardship
  - Network leader planning meetings
  - Your entry into an event (leader tickets)
- Network compliance with protocols will influence future budget allocations



# Event Planning

## What we do as Staff Liaisons

Market events on website, Social Media and through emails

Coordinate multi-network events

Pull attendee data and constituent lists

Incentivize participation

Manage Social Media posts

Track budgets

Provide Insurance



## What we need from you

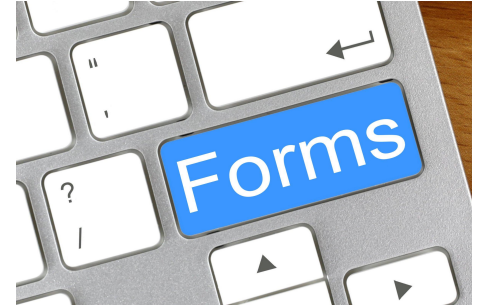
Advance notice of plans

Fill out pre/post event forms in a timely manner

Responsive to communications from CAAA

Read the Network Leader Newsletter

# Pre and Post Event Forms



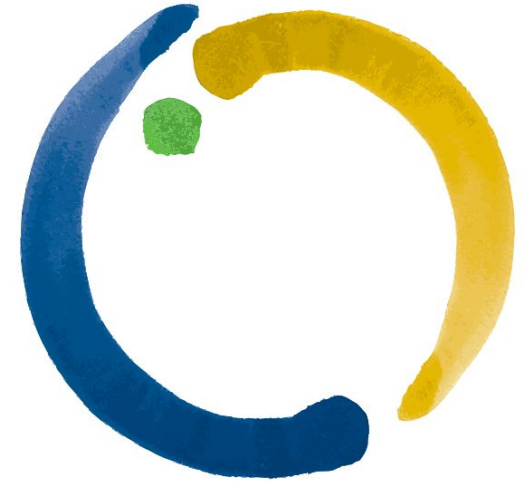
- [Event Planning Guide](#) (Event Ideas, Steps for Planning Events, and Tips)
- [Event Sponsorship Guidelines](#)
- [Career Event in a Box Facilitation Guides](#)
- [Event Request Form](#) (Needs to be Submitted 6 Weeks Before the Event)
- [Post-Event Form](#)



# Event Request Form & Event Planning

## Network Leader Resource Page: Event Planning and Resources

- [Event Request Form](#)
  - Events requests should be submitted in a timely manner access capacity, contracts, production timelines and network budget approval. Contact your CAAA liaison for questions when submitting the form. Event request form submission deadlines:
    - **Small events** (happy hour gatherings, volunteer meetups): *6-8 weeks prior to the event date.*
    - **Medium events** (wine tours, ticketed events, meals with programming, leadership in attendance requests): *3-4 months prior to event date.*
    - **Large events** (meetings with complex needs, galas, events with multiple contracts or vendors): *6 months or more prior to the event date.*
  - Questions about your event size and types? Contact your CAAA liaison as soon as you know about your event plans.



# Career in a Box





# Breakout Room Bonanza



**Back in 10 min!**

- **Aggie Spirit Breakout Room Photo**
  - Clothes, pom poms and more!
  - Include All Things UC Davis
  - Take a photo and post it on padlet:  
[padlet.com/pdterry1/caaavlc2022](https://padlet.com/pdterry1/caaavlc2022)
  - Oh and say hi!!



**Break**



# Marketing, Communications & Social Media

# DIGITAL MARKETING



## Roles of the CAAA liaison

- Gather data from regions to create newsletters
- Email and marketing
- Advertising events on Facebook and Emails

# Social Media and In-Person Event Guidelines

- [Social Media Guidelines](#)
  - Network leader newsletter
  - Network leader resource guide
- Social Media 102 during volunteer leadership conference
- In-Person Event Guidelines
  - Finalized guidelines on Network Leader Resource page October 29





# Network Collaboration

# We encourage you to create relationships with fellow leaders!

- These friendships deepen our community and can lead to combined virtual events and in-person events if a leader is traveling in the area of another leader
  - EXP - Hawaii and Arizona
- Cross UC collaboration





# Professional Development and CAAA Activities



# Network Leader Information

1. Quarterly Calls (required)
2. Network Check-ins (required)
3. Volunteer Leadership Conference (highly encouraged)
4. Affinity Network Careers Conference 2023 (optional)
5. Committees (highly encouraged)



# Leader Information

- Network Leader Newsletter (monthly)
- Regional newsletters
- Affinity Network Diversity Digest
- Social Media
  - Facebook
  - LinkedIn

## AGGIECONNECTIONS



Hi Paul,

Happy April!

This month is one of our favorite times at UC Davis as we celebrate Picnic Day and Give Day. It's also our annual registration deadline - due April 30th.

Take a peak below on information for our Quarterly Call and more in our April Network Leader Newsletter!

As always, don't hesitate to reach out to us if you need anything.

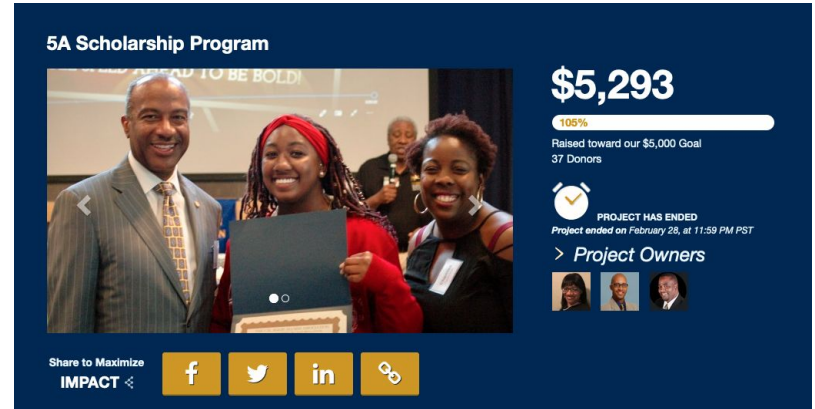
Take care,

Ashley - Northern California, National and International Networks

Paul - Southern California, Special Interest and Affinity Networks

# One Aggie Network Activities

- Give Day and Crowdfunds
- Scholarships
- Picnic Day Around the World
- Aggie Spirit Week
- New Student Welcomes
- Yield Events
- Athletic Viewing Parties
- Regional Connections
- Affinity Network Careers Conference 2023
- Network Events
  - Educational, Volunteer, Aggie Pride, Career
- Committees
  - Alumni Engagement
  - DEI Committee



5A Scholarship Program

**\$5,293**

100%

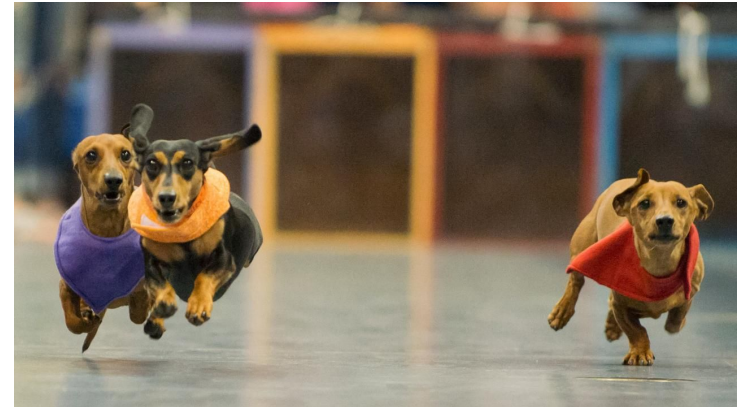
Raised toward our \$5,000 Goal  
37 Donors

**PROJECT HAS ENDED**  
Project ended on February 28, at 11:59 PM PST

> Project Owners

Share to Maximize IMPACT

f t in





**Break**



# Principles of Community



Living the  
**Principles of  
Community**





*Principles of Community*

**Harassment &  
Discrimination Assistance  
and Prevention Program**

- Campus values and aspirations on inclusivity and belonging
- Living the UC Davis Principles of Community
- Campus resources
- Reporting mechanisms on campus and with CAAA

## UC Davis Principles of Community



Value our differences and  
common ground

Adopted in 1990, reaffirmed  
1996, 2001, and 2010



Revised and reaffirmed in 2015

Strong statement about  
systemwide community values



## Principles of Community



“We recognize that each of us has an obligation to the UC Davis community of which we have chosen to be a part.”

“We will strive to build and maintain a culture and climate based on mutual respect and caring.”

# Volunteer Leader Expectations

## Terms and Conditions form

- Ensure privacy with alumni data and privacy, promoting a community of trust.
- Communicating with your CAAA liaison for any questions as soon as possible to seek support and answer questions.
- Emulate the Principles of Community when engaging our Aggie Community.
- Abide by UC Davis policy and procedures, including those around student, donor and alumni data.



# Tips, Challenges & Successes

# Tell us all about it

## Hosting Events in 2022

### Who's done what?

- Successes!
- Failures

## Looking to the 2nd Half of 2022

- What do you have planned?
- Roadblocks? Concerns?
- Successes?

## How can we help?



# Network Leader Resource Page

- Registration resources
- Training on being a leader
- Volunteer Leadership Conference resources
- Newsletters and calls
- Recruiting new leaders
- Social media guidelines
- Event planning
- Pre and Post Event forms







**Thank you!**