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Temple University Alumni Association Shared Governance Project

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Shared Governance Project



Purpose: Elevating and modernizing Temple University’s alumni engagement efforts, the Advancement Engagement team has formulated a comprehensive set of standardized alumni volunteer and governance policies for the Temple University Alumni Association, and all TUAA constituent organizations, including School and College alumni associations, Regional Networks, and affinity groups. These policies aim to equip Temple’s dedicated staff professionals and volunteer leaders with the tools to define volunteer and conduct expectations, and to offer clear protocols for addressing any potential governance challenges. Both Temple University and the Temple University Alumni Association’s legal counsels have reviewed and approved the content.

Target Audiences: Temple professionals who manage, liaise with and/or support TUAA constituent organizations and volunteer leaders are the primary users of this document. The document can be leveraged as an onboarding tool for all audiences.

Key Components:

- 1. **Temple Professionals:** New Policies & Procedures, Collection & Tracking of Signed Documents, Advancement Engagement Workflow & Process, Addressing Governance Challenges
- 2. **Volunteers:** Acknowledgement of Volunteer Roles and Responsibilities, Addressing Governance Challenges

Implementation:

Advancement Engagement will partner with and serve as resources to Temple professionals and volunteer leaders through the mandated adoption, implementation and maintenance of shared policies and documentation. ***The inability to implement or comply with the outlined policies or procedures may result in the organization’s ineligibility to receive annual operating stipends, apply for TUAA Projects Grants, and other supplemental funding opportunities.***

Questions:

For questions or support, email tuaagov@temple.edu.

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ORGANIZATION OVERVIEW



I. Temple University Alumni Association (TUAA)

The Temple University Alumni Association (TUAA) promotes the interests of Temple University and its alumni. The TUAA is dedicated to strengthening and enhancing all relationships among alumni, faculty, administration, students and governing bodies of Temple University. All graduates of Temple University are welcomed into the TUAA upon graduation. The TUAA is administratively managed and staffed by Alumni Engagement and encourages active alumni participation in support of Temple's mission and Institutional Advancement and Advancement Engagement priorities.

II. School and College Alumni Associations

School and college alumni associations represent the existing 17 Temple University schools and colleges and provide programming and opportunities specific to their alumni bases. School and college alumni associations are administratively managed by staff within the respective school or college, and are centrally supported by Advancement Engagement. All school and college alumni association presidents serve on the TUAA Parliament and TUAA School/College Alumni Association Presidents Committee.

Organization	Activity Code	Leadership Description
Beasley School of Law Alumni Association	Alumni Board	Law, Beasley School
Boyer College of Music and Dance Alumni Association	Alumni Board	Music & Dance, Boyer College
College of Education and Human Development Alumni Association	Alumni Board	Education & Human Development
College of Engineering Alumni Association	Alumni Board	Engineering
College of Liberal Arts Alumni Association	Alumni Board	Liberal Arts
College of Public Health Alumni Association	Alumni Board	College of Public Health
College of Science and Technology Alumni Association	Alumni Board	Science & Technology
Fox School of Business Alumni Association	Alumni Board	Fox School of Business
Lewis Katz School of Medicine Alumni Association	Alumni Board	Medicine
Maurice Kornberg School of Dentistry Alumni Association	Alumni Board	Dentistry, Kornberg School
Klein College of Media and Communication Alumni Association	Alumni Board	Media & Communications
School of Pharmacy Alumni Association	Alumni Board	Pharmacy
School of Podiatric Medicine Alumni Association	Alumni Board	Podiatric Medicine
School of Social Work Alumni Association	Alumni Board	Social Work
School of Sport, Tourism and Hospitality Management Alumni Association	Alumni Board	Tourism & Hospitality Mngmnt
School of Theater, Film and Media Arts Alumni Association	Alumni Board	Theater, Film & Media Arts
Tyler School of Art and Architecture Alumni Association	Alumni Board	Art Architecture, Tyler School



iii. University-Affiliated Alumni Groups



University-affiliated alumni groups are led by Advancement Engagement staff, supported by alumni volunteers and collaborate with the TUAA to provide targeted engagement opportunities, serving the interests of young alumni, students, regional networks and shared interest groups. Alumni representatives from each group serve on the TUAA Parliament.

Regional Networks

Below is the list of Alumni Regional Networks, which have been prioritized based on current strengths, engagement productivity and leadership of the former Regional Chapters, alumni population, density of current and potential donors, and interest from internal partners. Advancement Engagement will travel to these locations annually, at varying frequencies, to host various engagement activities and events and conduct meetings with ambassadors and alumni.

Regions	Constituent Base Alumni in the following areas*	Activity Code
Atlanta	Atlanta-Sandy Springs-Alpharetta; Macon-Bibb County; Columbus; Rome; Gainesville	RCLA
DC, Maryland, Virginia	Baltimore-Columbia-Towson, Washington-Arlington-Alexandria	RCLBA
Greater Philadelphia	Philadelphia-Camden-Wilmington; Trenton-Princeton; Allentown-Bethlehem-Easton; Atlantic; Ocean City; Vineland-Bridgeton	RCLPH
Los Angeles	Los Angeles-Long Beach-Anaheim; Riverside-San Bernardino-Ontario; Oxnard-Thousand Oaks-Ventura, San Diego-Chula Vista-Carlsbad	RCLLA
Metro New York	New York-Newark-Jersey City; Bridgeport-Stamford-Norwalk; Poughkeepsie-Newburgh-Middletown; New Haven-Milford	RCLNY
Northern California	San Francisco-Oakland-Berkeley; San Jose-Sunnyvale-Santa Clara; Santa Rosa-Petaluma; Napa; Vallejo; Santa Cruz-Watsonville; Modesto; Merced	RCLNC

International Alumni

Advancement Engagement partners with Global Engagement and International Admissions, to engage with more than 10,000 alumni living internationally. Advancement Engagement aims to be a resource and collaborative leader to support shared partner and university-wide goals.

To help foster and cultivate mutually beneficial relationships in far-reaching areas with dense alumni populations, Advancement Engagement assists Temple University Global Engagement and International Admissions with the following:

1. Requesting, analyzing and providing international alumni data and information.
2. Supporting event or program registration through web builds and list management.
3. Marketing planned events and programs via designed and targeted emails and digital promotion.
4. Providing limited-edition alumni swag and giveaways.
5. Supporting ongoing connection opportunities for alumni through the Owl Network, Temple's official online community.

As of 2023, Tokyo is the only official international network. It's managed and supported by the staff of the Temple University Japan Campus and identified volunteer ambassadors.

Organization	Constituent Base Alumni in the following area	Activity Code
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Tokyo Network	Tokyo	RCTOK
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Society and Affinity Groups

Organization	Constituent Base	Activity Code
Temple University Black Alumni Alliance	Black alumni and students	BALA
Temple University Young Alumni Association	Alumni and students who are 30 years of age or younger	YAAB
Temple Women's Network	Alumni and students identifying as female	TWN
Honors Alumni Council	Alumni of the honors program	HAC

GOVERNANCE STRUCTURE

I. VOLUNTEER LEADERSHIP

Temple University Alumni Association Volunteer Leadership

The TUAA is governed by officers, an executive committee and the Parliament.

Officers: The TUAA is led by a group of elected officers who serve three-year terms: president, vice president of operations, vice president of external affairs, treasurer and secretary. Co-counsel are appointed by the TUAA president. The TUAA president serves on the Temple University Board of Trustees during their term. The TUAA executive director dually serves as assistant vice president of Advancement Engagement and is the highest-ranking university official serving TUAA.

Executive Committee: The TUAA is governed by an executive committee composed of the above referenced officers, ten elected at-large members and appointed committee chairs. The executive committee meets quarterly and serves as the governing body of the TUAA.

Parliament: The Parliament is the 70-member representative alumni organization, including officers and the executive committee referenced above. The Parliament serves as a two-way medium to bring Temple, TUAA and Advancement Engagement news and programming to all alumni constituent groups, as well as to bring to the TUAA the voice and programs of constituent boards and associations. Duties of Parliament include reviewing the annual operating budget; attending and promoting the activities, programs and services of the TUAA and Advancement Engagement; attending TUAA meetings; making an annual donation; and voting in TUAA elections. The Parliament is composed of the following members:

- Officers
- Directors-at-large
- Presidents, school and college alumni associations
- Regional network representatives
- President, Owl Club
- President, Temple Women's Network
- President, Temple University Black Alumni Alliance
- President, Temple University Young Alumni Association
- Temple Student Government representatives
- Faculty representatives



TUAA bylaws, developed together by TUAA-appointed volunteer counsel, Advancement Engagement and IA leadership, provide structural guidance to the organization as a whole in conducting its business.

[VIEW TUAA BYLAWS](#)



School and College Alumni Association Leadership

Each school and college alumni association is led by an independent officer group and board assembled to best benefit alumni engagement and support for the priorities of the school or college. Board members are elected through procedures outlined in school and college alumni association organizational guidelines, adhering to a set term limit.

University-Affiliated Group Leadership

Regional Networks

Select regional networks are made up of 8–12 alumni volunteer ambassadors, operating in a nonhierarchical structure. Ambassador applications are vetted through the Advancement staff liaisons. Regional ambassadors serve an initial two-year term, with the eligibility to serve additional terms.

Society and Affinity Groups

Each society and affinity organization is led by a volunteer board and officer group, executing programming and opportunities to engage students and alumni affiliated with a shared interest or affinity. Volunteer leaders are elected through procedures outlined in affiliate group organizational guidelines, adhering to a set term limit.

II. ADVANCEMENT ENGAGEMENT LEADERSHIP & SUPPORT

Advancement Engagement

Advancement Engagement serves as the primary entry point to all Temple University Institutional Advancement (IA) activity and focuses its priorities and goals on three basic pillars: increasing alumni and constituency engagement; continued alignment and support of the TUAA; and advancing philanthropic efforts and support to Temple. Advancement Engagement is directed by an assistant vice president (AVP), and its work is supported by staff reporting to one of four units, Alumni Relations, Advancement Events, Advancement Communications or TUAA Schools & Colleges, providing primary staff support and governance oversight to the TUAA.

Advancement Engagement offers a suite of tools, resources and support to most efficiently and effectively engage and communicate with volunteers; best practices to manage and govern volunteer organizations; and provide standard engagement metric definitions to share collective successes.

Temple University Alumni Association

The TUAA and its volunteer leadership supports the creation of a comprehensive strategic plan. The policy development, goal strategy, decision-making and management of its constituent groups rests with Temple University and Advancement Engagement to ensure alignment. Advancement Engagement is responsible for the day-to-day oversight of the business and fiscal affairs, and activities of the TUAA, and developing constituent programs consistent with Institutional Advancement and university priorities.





School and College Alumni Associations

School and college alumni volunteer boards help to establish organizational strategy and priorities for their work, implementing an annual plan. Policy development, goal strategy, decision making and management of each constituent group rests with school and college staff and leadership.

University-Affiliated Alumni Groups

Regional Networks

Regional ambassadors work under the guidance and direction of Advancement Engagement to support identified priorities to engage and recruit regional alumni. Policy development, goal strategy, decision making and management rests with Advancement Engagement.

Society and Affinity Groups

Volunteer leaders work under the guidance and direction of Advancement Engagement to establish an organizational strategy in alignment with TUAA, Advancement Engagement and Temple University's overall priorities, and execute an annual plan. Policy development, goal strategy, decision making and management of each society and affinity group rest with Advancement Engagement or other appropriate university unit.

III. BUDGETARY SUPPORT, FINANCIAL MANAGEMENT AND CONTRACTING

Advancement Engagement

Advancement Engagement activities are primarily funded from the university's Institutional Advancement budget. Each year, Advancement Engagement also receives additional financial support from the Temple University Alumni Association to supplement and offset costs associated with university support of alumni engagement activities and programs.

Temple University Alumni Association

The TUAA is an independent 501(c)(3) corporation that provides significant support for alumni engagement programming, event and initiative to the university annually. TUAA funds are not allocated to Advancement Engagement staff salaries, technology or other day-to-day operational expenses, but rather to pay for university support of TUAA administration, activities and goals. The TUAA income is generated from investments, alumni affinity products and benefits, and donations. TUAA bookkeeping, audit, tax returns, and additional state and federal legal requirements are managed by the university through Advancement Engagement or appropriate university unit.

School and College Alumni Associations

School and college alumni associations are legally organized under the TUAA's 501(c)(3) tax-exempt status, carry its tax identification number (EIN) and are included in its annual audit and tax returns. A school or college can choose to finance its alumni association's activities.

All school and college associations are eligible for a once-annual \$2,500 TUAA operating stipend, in the event that their treasury falls below \$6,000 in a given fiscal year. The stipend is automatically applied when an association's treasury falls below the threshold. The funds are designed to cover routine expenses to conduct board meetings and alumni programming.





In addition, through the TUAA Grants Program, school and college associations may be awarded up to \$3,000 annually for new or enhanced alumni programming. Applications are accepted biannually, and are reviewed and approved by the TUAA Awards Committee.

Finances of school and college alumni associations are jointly managed by association treasurers, school and college staff, and Advancement Engagement. The schools and colleges submit transaction requests to the business manager, who completes transactions and provides quarterly treasurer's reports to associations. Temple University allows the schools and colleges, through Advancement Engagement, the use of its Financial Management System to process financial transactions and reports. All transactions are signed off by the Assistant Vice President, Advancement Engagement.

University-Affiliated Alumni Groups

All university-affiliated alumni groups are entirely funded and financially managed through the university's Advancement Engagement budget and fall under the university tax identification number (EIN). The TUAA may provide supplemental budgetary support for university-affiliated alumni group programming, events or initiatives on a case-by-case basis.

Contracting Policies for TUAA, University-Affiliated Groups and Volunteers

All arrangements for on-campus or off-campus events—whether sponsored by the Temple University Alumni Association (TUAA), a University-Affiliated Group, or initiated by an individual volunteer—must receive prior written approval from the designated staff liaison and business manager. This policy applies to any event or initiative carried out on behalf of a Temple volunteer organization or for personal purposes. The staff liaison will act as the primary point of contact for Temple departments and external vendors, handling all communications and logistical coordination, including room reservations, facilities, catering, and vendor relations. Volunteers are strictly prohibited from signing contracts or agreements on behalf of Temple University or any Temple University related organizations under any circumstances. Compliance with Temple University's current business services, purchasing, and finance policies is required for all volunteers and organizations.

NEW POLICIES & PROCEDURES

I. REQUIRED DOCUMENTATION AND TEMPLATES

The policies, procedures or templated governance documents as outlined below should be adopted by all units, and may not be amended without prior consultation with TUAA and Advancement Engagement leadership.

Mission Statement

Must include:

- Name, purpose and objective of constituent organization.
- Connection as a constituent organization of the Temple University Alumni Association.

[Mission Statement Template](#)





Bylaws

Bylaws of all TUAA constituent organizations should be reviewed annually by respective boards and submitted to Advancement Engagement at the start of each fiscal year for official record keeping.

New requirements for all organizations:

- Affiliation to Temple University Alumni Association.
- Statement of inclusion and diversity.
- Minimum annual gift to Temple University.
- Volunteer term limits/fiscal-year coordination.

[Sample Language to Add to Bylaw Template](#)

Required for all TUAA, school and college alumni association and university-affiliated alumni group organizations:

- Legal name and status
- Mission
- Membership categories
- Membership duties
- Standing committees
- Meetings and quorum
- Elections
- Bylaws amendment process

[Existing Bylaw Template](#)

Code of Conduct

Includes:

- Rules of conduct
- Behavioral expectations
- Preventing and addressing discrimination and harassment
- Preventing and addressing sexual misconduct
- Contact information and appropriate use of online portals
- Social media standards and guidelines
- Transportation
- Injury
- Alcohol and drug policy

[Code of Conduct](#)

Conflict of Interest

Includes:

- Outline guidelines that control and manage decision making.
- Undisclosed situations that may result in financial gain.
- Reporting and procedures to follow when potential conflicts arise.
- Defined list of close business or family relationships.





Confidentiality Agreement

Includes:

- Handling and access to privileged and confidential information.
- Disclosure of personal or confirmed information.
- Potential conflict of interest.

[Confidentiality Agreement](#)

Multimedia Image Consent and Release

Includes:

- Recording of likeness.
- Use of name in connection to multimedia content.
- Reproducible content for any purpose deemed appropriate.
- Release acknowledgement.

[Multimedia Image Consent and Release](#)

Volunteer Acknowledgement of Roles and Responsibilities

The Volunteer Acknowledgement of Roles and Responsibilities establishes and affirms the volunteer's review, understanding and adherence to all outlined responsibilities and governance documentation. The signed agreement provides the foundation for acceptable volunteer behavior and the basis for disciplinary action should violations occur. All Temple University volunteers, regardless of organization affiliation, will be required to sign this form at the time of their volunteer onboarding and at the beginning of each subsequent fiscal year of volunteer service.

Must include:

- Document objective.
- Minimum requirements for all alumni volunteers.
- Frequency and timing of signatures.
- Acknowledgement of review of and adherence to:
 - Code of conduct.
 - Conflict of interest.
 - Confidentiality agreement.
 - Multimedia image consent and release.
- Failure-to-comply statement.

[FOR VOLUNTEER SIGNATURE](#)

[Volunteer Acknowledgement of Roles and Responsibilities Form](#)

Annual Plan and Report

The intent of the annual plan and report is to provide the Temple University Alumni Association with school and college alumni association and university-affiliated alumni group fiscal-year plans and resulting outcomes. The documents will help the TUAA and Advancement Engagement track, support and collaborate with all organizations, and highlight collective TUAA successes. Staff liaisons are required to submit a completed annual plan and annual report each fiscal year. [VIEW PLAN & REPORT FORMS ON THE TUAA TOOLKIT](#)





Annual plan must include:

- Primary objectives and goals.
- Scheduled board meetings.
- Volunteer pipelining opportunities.
- Planned events.

Annual report must include:

- Update/status of primary objectives and goals.
- Executed board meetings.
- Overview of executed events.
- Successes and challenges.

II. COLLECTION & TRACKING OF SIGNED DOCUMENTS

Collection

To standardize the distribution and collection of volunteers' documents, Advancement Engagement will share the Volunteer Acknowledgement of Roles and Responsibilities form, and linked supplemental documents, via Adobe Sign to obtain all TUAA, school and college alumni association and university-affiliated alumni group volunteer signatures.

- The link to the form and supplemental documents will be housed on alumni.temple.edu/tuaanow.
- An email will be sent to all active volunteers from tuaagov@temple.edu. Advancement Engagement will receive a confirmation email and copy when the document has been signed.
- The volunteer should use the dropdown to select the appropriate volunteer organization(s) for which the document is signed. Only one document will need to be signed for all volunteer roles.
- Once the form has been completed, volunteers will receive a second email from Adobe Docusign with a request to verify the email address included on the signed document.

This process will be initiated on a quarterly basis by Advancement Engagement. It is up to the staff liaison for all TUAA, school and college alumni associations and university-affiliated alumni groups to ensure that their volunteers sign the document (both new and active volunteers), and update activity codes (see below).

Tracking + Coding

Volunteer Status

TUAA, school and college alumni association and university-affiliated alumni group staff liaisons are required to submit updates (end dates for inactive volunteers, and new activity code and start dates for active volunteers) to GAARecs. Updates should be reviewed and updated quarterly.

See the list of activity codes/leadership descriptions on pages 4–6.

[TEMPLATE to be attached to GAARecs form for ACTIVE Volunteers.](#)

[TEMPLATE to be attached to GAARecs form for INACTIVE Volunteers.](#)

Volunteer Submission of Signed Volunteer Acknowledgement of Roles and Responsibilities Form



Once a signed copy of the Volunteer Acknowledgement of Roles and Responsibilities is received by Advancement Engagement via the Adobe Sign process, Advancement Engagement will add a leadership code (VARR – Vol Ack Roles/Responsibility) to the TUAA constituent organization volunteer code in the individual's Banner record. The start date will be the first date of the fiscal year. The end date will be the date when the form was received. See example below:



Activity	Activity Code	Type and Comment	Category	Leadership	Leadership Code	Begin	End
Alumni Board	AA	Unit Volunteer	Board/Council	Art Architecture, Tyler School	TA	6/8/2022	
Alumni Board	AA	Unit Volunteer	Board/Council	Vol Ack Roles/Responsibility	VARR	7/15/2023	7/15/2023

III. GOVERNANCE ACTIVITY CALENDAR

Below is the general timeline in which documents should be reviewed and returned, data updated, and the responsible party for initiating the outlined activities. *Should the dates fall on a weekend, the deadline will be moved to the next business day. The timeline is subject to change. Advancement Engagement will provide updates at the beginning of each fiscal year.*

Activity	Timeline	Responsible Party to Initiate
Share a copy of bylaws	July 1	Staff Liaison
Submit inactive/active volunteer activity codes	August 1 November 1 February 1 May 1	Staff Liaison
Send Volunteer Acknowledge Agreement	August 15 November February 15 May 15	Advancement Engagement
Update signed agreement activity codes	September 1 December 1 March 1 June 1	Advancement Engagement
Submit Annual Plan Part 1 Part 2	August 31 January 1	Staff Liaison
Submit Annual Report	July 15	Staff Liaison

ADVANCEMENT ENGAGEMENT WORKFLOW & PROCESS

Advancement Engagement offers a variety of creative services, tools and resources to support alumni engagement and activities across Temple University. The continued utilization of these services from partners streamlines Temple's comprehensive alumni engagement efforts, better informs each other about upcoming events, programming and opportunities, and tracks our collective efforts through standard quantitative and qualitative data gathering and reporting.

I. SHARED ALUMNI ENGAGEMENT METRICS

Each fiscal year, Advancement Engagement outlines alumni engagement metrics to measure performance, helping to quantify and share our collective work and successes across TUAA, school and



college alumni associations and university-affiliated alumni groups. Identified metrics support CASE Insights on Alumni Engagement definitions.

More details on the definitions, activities to track and report, and procedures to submit and update engagement data will be shared.



II. EVENT MANAGEMENT

All TUAA, school and college alumni association and university-affiliated alumni group events should be hosted, promoted and tracked through Event Management and Anthology. This process, led by Advancement Engagement, will ensure increased visibility and promotion of events across TUAA; identify opportunities for collaboration; allow for strategic scheduling to not cannibalize attendee audiences; and track attendee trends and data. **The Event Management process and forms must be submitted by staff liaisons.**

[Event Request Build Form](#)

[Website and Event Edit Request Form](#)

Pre-Event Registration Process

- Advancement Events will manage Event Management registration.
- Event Management lists are updated Monday, Wednesday and Friday. If you need to view a list, please reach out to the Advancement Engagement administrative specialist at alumni@temple.edu for an up-to-date list.

Post-Event Registration Process

- The event owner (staff liaison) is responsible for submitting the updated registration list (attendees, no shows, walk-ups) to the Advancement Engagement Administrative specialist at alumni@temple.edu within one business day of the event.

III. EVENT PARTNERSHIPS

Signature Events

Advancement Engagement hosts signature events with the goals to instill pride, celebrate and recognize successes of alumni, constituents and Temple at large; and support philanthropic efforts associated with these events. TUAA, school and college alumni associations and university-affiliated alumni groups are encouraged to develop and execute unique programming to engage their constituent base in alignment with the core themes and objectives of each signature event. Advancement Engagement will share updates and requests on an annual basis. **The Event Partnership process must be initiated by staff liaisons.**

Athletics

Should TUAA, school and college alumni associations and university-affiliated alumni groups have interest to host/sponsor tailgates, basketball pregame events or other athletic event opportunities, Advancement Engagement will act as the liaison between partners and Athletics, the Liacouras Center, Aramark or other entities. Staff liaisons should submit interest via email to the Advancement Events team.

IV. DESIGNATION MANAGEMENT

Advancement Communications manages all online giving requests and updates for Institutional Advancement. The Designation Management Request form should be used by staff liaisons to request a new custom giving page, edit an existing custom giving page and/or modify funds appearing on one of



Temple's main giving forms. An additional scoping call may be required to understand project needs.
The Designation Management process and forms must be submitted by staff liaisons.

[Designation Management Request Form](#)

v. EMAIL SUPPORT

Advancement Communications develops and sends a variety of email communications to constituents on an annual basis. The email process varies for reoccurring newsletters and standalone sends. While school/college partners have the option for Advancement Communications to deploy the message via IA's email platform or their own email platform, the send date and data request **MUST** go through Advancement Communications. For reoccurring newsletters or communications, Advancement Communications will coordinate with staff liaisons and partners biannually to map out send dates for a six-month time frame. To request additional send dates or for units with no preassigned send dates, staff liaisons and partners should use the form below. **The Email Support process and forms must be submitted by staff liaisons.**

[Email Request and Content Submission Form](#)

Leadership Updates

Advancement Communications, IA leadership and Strategic Marketing and Communications will determine how/if to share presidential or Temple leadership communications to the larger Temple community (alumni and donors). They will review and discuss communication strategy and content of the potential message to determine if a separate, standalone email should be sent to alumni and donor constituents. If a standalone email is not warranted, the story or update will be shared, as appropriate, in the next @Temple or alumni newsletter, the IA Comms Roundup and possibly promoted on TUAA's social media pages.

vi. SOCIAL MEDIA BEST PRACTICES

Advancement Communications created social media best practices guides and tips, to serve as a resource for staff and alumni volunteers who manage or support content curation and engagement on social channels.

[Alumni Volunteer Social Media Standards](#)

[Social Media Best Practices Guide](#)

[Social Media Tips](#)

[List of Temple University Social Channels](#)

vii. TUAA TOOLKIT

The TUAA Toolkit is a collection of operation and policy resources to support all TUAA, school and college alumni associations and university-affiliated alumni groups.

[VIEW TOOLKIT](#)

Includes:

- TUAA Audit and Tax Requirements
- Check/Cash Receipt Form
- Check Payment Request Form
- TUAA Budget: Excel Template
- Alumni Fellows Nomination Procedures and Form
- Project Grants and Procedures



- TUAAGov Project Grant Final Report Form
- TUAAGov Volunteer Primer/History
- W-9 Form
- Vendor Verification Form
- General FAQs



ADDRESSING GOVERNANCE CHALLENGES

The responsibility to initiate any necessary disciplinary action, lies with the Temple staff liaison, and the volunteer president, officer group, highest-ranking volunteer, volunteer president, officer group or highest-ranking volunteer.

A framework has been developed to guide volunteers and staff liaisons in determining the appropriate response for various violations. If a violation warrants additional expertise or feedback, the executive director of the TUAAGov may involve TUAAGov leadership, university counsel, or school and college administration. *The TUAAGov and Advancement Engagement maintain the right to modify the disciplinary actions outlined in these policies at any time.*

Staff liaisons should document and track all actions taken under the governance challenge framework in the form of contact reports.

If, after following the provided framework, it is determined that a volunteer should be removed from their role and responsibilities, the staff liaison must consult with Advancement Engagement and the TUAAGov Executive Director to review the issues and the corrective steps taken. Once it is confirmed that the framework has been properly followed and the volunteer has been given sufficient opportunities to address their behavior, the staff liaison should draft the Termination Letter for approval by the Executive Director. Once approved, the Termination Letter will be sent to the alumni volunteer formalizing the termination of the volunteer's role. The TUAAGov Executive Director and TUAAGov President should be copied on this communication.

To use the chart, identify the category (A–D) that corresponds to the violation and follow the column down for information about the disciplinary action and the responsible party for the administration. More information about the types of actions within each category is provided below the chart.

Draft templates are available upon request to support the execution of a written warning and volunteer role termination. Contact tuaagov@temple.edu.

HOW TO ADDRESS A GOVERNANCE CHALLENGE				
	Category A	Category B	Category C	Category D
1 st Action	General counseling	Verbal counseling	Written Warning	Formal meeting
Party Responsible for Disciplinary Actions	Volunteer president or officer, and/or staff liaison when neither position is	Volunteer president or officer, and/or staff liaison when neither	Staff liaison, and Volunteer president or officer	Staff liaison and volunteer president or officer, with support as





	<i>available; conducted via email, phone or meeting</i>	<i>position is available</i>		<i>needed from TUAA President, TUAA executive director, school or college dean</i>
2nd Action	Verbal counseling	Written warning	Formal meeting	Volunteer role termination
Party Responsible for Disciplinary Actions	<i>Volunteer president or officer, and/or staff liaison when neither position is available</i>	<i>Staff liaison, and Volunteer president or officer</i>	<i>Staff liaison and volunteer president or officer, with support as needed from TUAA President, TUAA executive director, school or college dean</i>	<i>Staff liaison and volunteer president or officer; copy TUAA president and TUAA executive director, TUAA legal counsel</i>
3rd Action	Written warning	Formal meeting	Volunteer role termination	
Party Responsible for Disciplinary Actions	<i>Staff liaison, and Volunteer president or officer</i>	<i>Staff liaison and volunteer president or officer, with support as needed from TUAA President, TUAA executive director, school or college dean</i>	<i>Staff liaison and volunteer president or officer; copy TUAA president and TUAA executive director, TUAA legal counsel</i>	
4th Action	Formal meeting	Volunteer role termination		
Party Responsible for Disciplinary Actions	<i>Staff liaison and volunteer president or officer, with support as needed from TUAA President, TUAA executive director, school or college dean</i>	<i>Staff liaison and volunteer president or officer; copy TUAA president and TUAA executive director, TUAA legal counsel</i>		
5th Action	Volunteer role termination			



Party Responsible for Disciplinary Actions	<i>TUAA president, TUAA executive director, staff liaison, school or college dean, volunteer president or officer</i>			
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Category A

- I. **Violation of the Volunteer Acknowledgement of Roles and Responsibilities**
 - a. Inability to meet expectations outlined in the Volunteer Acknowledgment of Roles and Responsibilities agreement, including a volunteer's commitment to:
 - i. Make an annual gift to Temple University annually.
 - ii. Attend at least one Temple event within the current fiscal year.
 - iii. Attend or participate in the minimum required meetings, programs or initiatives within the current fiscal year.

Category B

- I. **Violation of the Volunteer Code of Conduct**
 - a. Inability to meet the expectations outlined in the "Rules of Conduct" section.
 - b. Inability to meet the expectations outlined in the "Behavioral Expectations" section.
- II. **Violation of Social Media Standards**
 - a. Inability to meet the expectations outlined in the "Standards for all types of engagement on social media on behalf of Temple" section.
 - b. Inability to meet the expectations outlined in the "Standards for departmental, volunteer boards and committee use of social media on behalf of Temple" section.

Category C

- I. **Violation of Alumni Volunteer Code of Conduct**
 - a. Inability to meet the expectations outlined in the "Contact Information and Appropriate Use of Online Portals" section.
- II. **Violation of Volunteer Confidentiality Agreement**
 - a. Inability to meet the expectations outlined in Section 9.
- III. **Violation of Social Media Standards & Guidelines**
 - a. Inability to meet the expectations outlined in the "Standards for individual alumni volunteer personal use of social media" section.
- IV. **Violation of Conflict of Interest**
 - a. Inability to meet the expectations outlined in the "Conflict of Interest Agreement."

Category D

- I. **Violation of Code of Conduct**
 - a. Inability to meet the expectations outlined in "Preventing and addressing discrimination and harassment," "Preventing and addressing sexual misconduct policy" or the "Drug and alcohol" section.



II. **Violation of Volunteer Confidentiality Agreement**

- a. Inability to meet the expectations outlined in Section 4: Treatment as institutional data (during and after volunteering).

