



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.

The invaluable collective contribution of Temple alumni volunteers is central to propelling Temple's mission forward. The formal establishment and embrace of the organizational and volunteer policies will streamline all alumni volunteer endeavors, while aligning volunteer expectations across all entities.

Impact on the Alumni Organization:

Temple staff professionals and the highest-ranked volunteer leaders of each constituent organization will receive a comprehensive governance onboarding document. This document thoroughly introduces the operational dynamics of the Temple University Alumni Association and its constituent organizations. It further highlights the wealth of support and resources extended to all groups and volunteers through the TUAA and Advancement Engagement. As part of this collective endeavor, all alumni organizations are encouraged to incorporate standardized language and expectations into their bylaws, ensuring consistency. Furthermore, organizations are expected to share their roster of active volunteers, annual plans and end of fiscal year reports, fostering transparency and cohesiveness.

To emphasize the importance of incorporating these new practices, organizations who neglect to adopt the recommended policies or procedures may impact an organization's eligibility to access annual operating stipends, apply for TUAA Projects Grants, and other supplementary funding opportunities.

Impact on Individual Volunteer:

1. **Uphold Temple Policies and Guidelines:** Temple University trusts that each volunteer, as alumni ambassadors and advocates, will embody the institution's core values. Temple University views alumni volunteers as representatives of Temple, and thus the same conduct policies should apply. Several of these policies were adapted from established Temple University faculty, staff, and student guidelines.

These policies and guidelines include:

- a. **Volunteer Code of Conduct and Social Media Standards:** Specifies conduct expectations, including online behavior.
- b. **Confidentiality Agreement and Data Sharing Guidelines:** Outlines how volunteers should handle constituent or institutional sensitive information.
- c. **Conflict of Interest Policy:** Addresses potential conflicts of interest and how to manage them.
- d. **Multimedia Image and Consent and Release:** Deals with the use of volunteers' image in print or digital media.





2. **Sign Volunteer Acknowledgement of Roles and Responsibilities Form:** All Temple volunteers are required to annually sign the Volunteer Acknowledgement of Roles and Responsibilities form. This form outlines minimum expectations for volunteers and provides links to the policies listed above that volunteers are expected to adhere to. See the form here: <https://tinyurl.com/TUVARR>. After completing the steps below, representatives from the Advancement Engagement team will be notified and receive a copy of the signed form.

To Sign the form:

- a. Visit <https://tinyurl.com/TUVARR>.
 - b. Click “continue” at the bottom of the page.
 - c. Read the document’s contents and supplemental links.
 - d. Initial to confirm your review and understanding of the policies and guidelines.
 - e. Select the organization(s) of which you serve as a volunteer leader. A volunteer can select up to 4 roles (ex. TUAA Parliament and Temple University Young Alumni Association).
 - f. Sign and print your name.
 - g. Once completed, select “Click to Sign” at the bottom of the page.
 - h. Add your preferred email address into the “Enter your information” field.
 - i. You’ll receive an email from “Adobe Sign” to your preferred email.
 - j. Select “Confirm my email address” in the body of the email.
3. **Addressing Governance Challenges:** In cases where a volunteer chooses not to sign the Volunteer Acknowledgement or Roles and Responsibilities form or breaches any stipulated policies, guidelines or volunteer expectations, a comprehensive set of disciplinary actions has been thoughtfully devised to help address governance challenges. This process is intended to be collaboratively and professionally managed by Temple staff and volunteer leadership. See matrix at the end of the document.

Inquiries and Support:

For any inquiries or support related to this initiative, please email tuaagov@temple.edu.

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 TUAA may involve TUAA leadership, university counsel, or school and college administration. *The TUAA 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 TUAA 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 TUAA Executive Director and TUAA 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.

HOW TO ADDRESS A GOVERNANCE CHALLENGE				
	Category A	Category B	Category C	Category D
1st Action	General counseling	Verbal counseling	Written Warning	Formal meeting
Party Responsible for Disciplinary Actions	<i>Volunteer president or officer, and/or staff liaison when neither position is available; conducted via email, phone or meeting</i>	<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>
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</i>	<i>Staff liaison and volunteer president or officer; copy TUAA president and TUAA executive</i>	



		<i>executive director, school or college dean</i>	<i>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>			

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).