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THE OHIO STATE UNIVERSITY
ALUMNI ASSOCIATION

REGIONAL ADVANCEMENT
FREQUENTLY ASKED QUESTIONS

INTRODUCTION

On September 24 and 25, 2015, more than 120 club and society volunteers gathered in Columbus for the 2015 Club and Society Leadership Symposium. At the annual meeting, The Ohio State University Alumni Association, Inc. (OSUAA) leadership and staff introduced a comprehensive approach to better-serving and supporting the Ohio State alumni groups in and, especially, outside of Ohio.

With the roll-out of the **Regional Advancement Plan**, OSUAA's goal is to partner with clubs and societies in a manner that allows them to achieve the most benefit, while advancing the university. Regional advancement is a coordinated effort to inform, inspire and engage Buckeyes near and far, and involves all aspects of advancement, including communications, alumni relations, fundraising, and IT support.

REGIONAL ENGAGEMENT

WHY IS THIS IMPORTANT?
- Buckeyes living outside of central Ohio are a significantly large group…and growing
- Regions outside of Ohio deserve more attention than they previously received
- Organized regional efforts will yield increased engagement and results

WHAT ARE THE REGIONS?
Based upon metro-areas, alumni population and equal distribution of alumni clubs, the OSUAA has identified six key regions:

Central Ohio – eight counties, 46 alumni societies
Northern Ohio – 46 counties and regional campuses
Southern Ohio – 34 counties
Western U.S. – Arizona, California, Colorado, Texas and Washington
Southeastern U.S. – Florida, Georgia, North Carolina and South Carolina
East coast/Midwest – Illinois, Indiana, Maryland, Michigan, New Jersey, New York, Pennsylvania, Virginia, and Washington, D.C.

Within the six regions, there are 12 target metro-areas:
Akron, Atlanta, Chicago, Cincinnati, Columbus, Cleveland, Dayton, Los Angeles, New York City, Sarasota, Toledo, and Washington, D.C.

WHO ARE THE STAFF MEMBERS FOR REGIONAL ENGAGEMENT AND WHAT ARE THEY RESPONSIBLE FOR?

- **Josh Harraman**, Senior Director of Alumni and Constituent Engagement
    - Oversees alumni and constituent engagement programs, regional engagement and student recruitment
- **Leslie Smith**, Program Assistant for Alumni and Constituent Engagement
    - Coordinates activities associated with the Alumni Scholarship Program, and provides support for regional engagement and student recruitment efforts
- **Craig Little**, Director of Alumni Societies
    - Oversees and provides support to Ohio State's 46 alumni societies
- **Heidi Glanzman**, Program Assistant for Alumni Societies
    - Provides support to Ohio State's 46 alumni societies
- **Regional Engagement Officers (REOs)**:
    - Broaden and deepen alumni and constituent engagement with volunteers
    - Serve as the official liaison between the university and a specific region/target metro-area
        - Beth Uniacke, Southern Ohio
        - Garry Jones, Northern Ohio
        - Tigi Habtemariam, East coast/Midwest
        - Ashley Pryor, Western U.S.
        - Brendan Braaten, Southeastern U.S.
- **Regional Support Specialists**:
    - Provide communication support for alumni clubs and societies via web, e-mail and print
    - Work closely with Craig Little, REOs, University Communications and Trademark and Licensing
        - Erin Howell
        - Jen Russell

GROUP REQUIREMENTS

WHAT ARE THE THREE REQUIREMENTS THAT GROUPS NEED TO COMPLETE TO BE RECOGNIZED AS AN OFFICIAL GROUP MOVING FORWARD?

- Adopt a constitution approved by the OSUAA Board of Directors
- Adopt Ohio State branding standards and guidelines
- Sign charter, which formalizes the relationships, roles and responsibilities between alumni group, OSUAA and the university, and the financial and programmatic support to be received by the club or society

WHEN MUST GROUPS COMPLETE THESE THREE REQUIREMENTS?
- Early adoption: February 28, 2016*
- Expected date of completion: June 30, 2016
- Last possible date: August 31, 2016**

*If completed by this date, a $500 incentive will be awarded to the group
**After this date, any groups who did not complete these requirements will no longer be recognized as an official group by OSUAA

WHY IS IT IMPORTANT TO ADOPT THE NEW LOGO AND BRANDING TOOLKIT?
For many major brands, you see the same logo, color scheme and other universal branding standards across the board, and this consistency is crucial to the brand's effectiveness. The university's adoption of the "Block O" as the official logo was designed to create a universal branding standard like other major universities and brands. In terms of alumni clubs and societies, basic brand uniformity will keep the "Block O" and other branding aspects the same across the country, so when alumni and friends visit a game watch in Cleveland or Atlanta, they're seeing the same logo and branding consistency. Creating consistency among alumni groups will allow for greater opportunity to connect and engage with alumni and friends around the world.

WHY IS IT IMPORTANT TO SIGN THE CHARTER?
The charter was recently created by the alumni association; it is a formal agreement between the alumni group, OSUAA and the university. Most of the charter was created based on a common understanding of the working relationship between OSUAA and groups for many years. Additionally, the charter sets forth standards that many organizations, structured similarly to the OSUAA, operate on, and have for many years. In its most general sense, the charter is a basic, yet imperative, understanding of how alumni groups and the OSUAA will operate with one another.

<p style="text-align:center;color:red;">GROUP CLASSIFICATION LEVELS (SCARLET, GRAY and CARMEN)</p>

WHAT DOES IT MEAN TO BE SCARLET? GRAY? CARMEN?
In an effort to better support and recognize our volunteer alumni groups, these three classifications will be used to categorize the engagement levels of all alumni groups each fiscal year (July 1 – June 30). Depending on group level, certain funds, awards and other benefits are available. A full list of the requirements and benefits for each level can be found here.

WHEN DO THESE LEVELS GO INTO EFFECT?
Beginning July 1, 2016, all groups will be placed into one of the three categories, and depending on whether a group is classified as Scarlet or Gray, they will receive the corresponding financial incentives.

Group functions such as events, fundraisers, board meetings, etc. that occur between July 1, 2015 and June 30, 2016 will be tracked by your REO or society staff member, and used to determine what level the group will be placed into on July 1, 2016.

HOW CAN THE INCENTIVE FUNDS BE USED?
The funds can be used for the alumni group's operational expenses, or the group could choose to deposit into its scholarship fund.

IF MY GROUP IS AT THE CARMEN LEVEL, WILL WE STILL RECEIVE SUPPORT FROM OSUAA?
Absolutely! We recognize that, for a variety of reasons, a group may not have the capacity, resources and/or interest in being a Scarlet or Gray group. If a Carmen group eventually wants to become Scarlet or Gray, the group's REO or society staff member can offer resources to help the group achieve its desired level.

CAN MY GROUP'S CLASSIFICATION LEVEL EVER CHANGE?
A group's level will be assessed and assigned at the end of each fiscal year. A group's level cannot change *during* the fiscal year.

WHERE DO I GET THE FORMS TO SUBMIT ATTENDANCE SHEETS/EVENT EVALUATIONS/MEMBERSHIP ROSTERS AND WHO DO I TURN THOSE IN TO?
Attendance sheets, event evaluations, membership rosters, and other forms can be found here, and should be e-mailed/faxed **within 30 days** after the event occurs. Groups must submit completed attendance sheets to receive any reimbursement for events; clubs should send this information to their REO and societies should send to either Heidi Glanzman or Craig Little.

DOES MY GROUP NEED TO COMPLETE THE YEAR-END REPORT?
Groups will regularly report their efforts throughout the year to their REO or society staff member through forms such as event evaluations. Due to this regular communication, a year-end report will no longer be required.

EVENTS

WHAT IS THE DIFFERENCE BETWEEN CATEGORY I AND II EVENTS?
A full list of event types and examples can be found here. There are seven types of Category I events, which usually involve a structured activity and active engagement from participants. There are four types of Category II events, which include board and general meetings and non-structured social events such as casual group hangouts and game watches.

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ARE THE FINANCIAL INCENTIVES ALREADY IN EFFECT?

Financial incentives for events will not go into effect until July 1, 2016; however, we are asking that groups still go through the steps of categorizing and reporting their events in the meantime so that they can become familiar with this process, and so that groups can be categorized into one of the three classification levels effective July 1, 2016.

WOULD MY GROUP RECEIVE FUNDS BEFORE OR AFTER EACH EVENT?

OSUAA will reimburse alumni groups up to $250 after each Category I event (except for a networking event, which is up to $500). Appropriate receipts and invoices must be submitted along with a post-event form and completed attendance sheet. If a group is not able to fund the event without OSUAA's assistance, they may contact their REO or society staff member to discuss options.

CAN WE DO SEVERAL CATEGORY I EVENTS OF THE SAME TYPE TO COUNT TOWARD SCARLET OR GRAY STATUS?

To have your events count for Gray status, you would need to do three Category I events representative of three distinct event types, and five Category I events for Scarlet. For example, doing a community service, networking and lifelong learning event would count, but if a group does five arts events, only one would count toward Scarlet or Gray status.

A given event can only count for one event type toward your goal of obtaining Scarlet or Gray status.

MAY WE BE REIMBURSED MORE THAN ONCE FOR COORDINATING AN EVENT OF THE SAME CATEGORY I EVENT TYPE?

If a group coordinates multiple events of the same Category I type, the group may still be reimbursed for each event (up to three times) up to $250 ($500 for networking events).

WHY DO YOU AWARD UP TO $500 FOR NETWORKING EVENTS ONLY?

We recognize that to coordinate a successful networking event, renting a conducive venue is often necessary and thus the $500 accounts for that additional cost.

HOW MANY ATTENDEES ARE NECESSARY TO HAVE OUR EVENT QUALIFY?

Because group memberships vary in size and the event types will cater to different alumni audiences, we do not set any minimum attendance requirement. We provide best practices to our alumni groups regarding effective event planning and marketing, but also understand that results can be unpredictable.