LEADERSHIP RESOURCE GUIDE 2020

'CANESCOMMUNITIES

CONNECTING YOU TO THE UM GLOBAL COMMUNITY

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MARKETING & OUTREACH MASS E-MAILS

OVERVIEW

Every 'Canes Community has the ability to send out mass e-mails using the 'Canes Community Mass E-mail Listserv Outlook Account, which contains an e-mail recipient listserv for each 'Canes Community's geographic area that is updated by the University of Miami's main constituent database.

'CANES COMMUNITY MASS E-MAIL ACCESS REQUIREMENTS

A maximum of two (2) 'Canes Community Executive Board members from each 'Canes Community may have administrative access to the 'Canes Community Mass E-mail Listserv Outlook Account. Users with administrative access must be University of Miami alumni. The Regional Engagement Team recommends assigning the President and Secretary with this access.

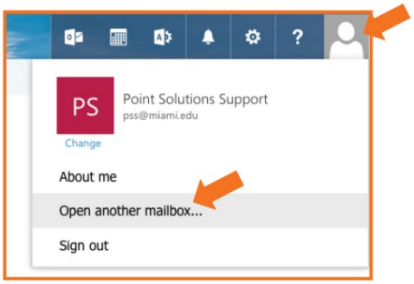
Important: Users with administrative access are responsible for ensuring that all confidentiality and mass e-mail guidelines (page 4) are followed on behalf of the 'Canes Community. It is strictly prohibited for users with administrative access to give their access to an unauthorized user.

'CANES COMMUNITY MASS E-MAIL SYSTEM TRAINING

Outlook Web Access (email.miami.edu)

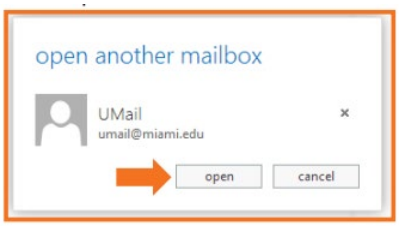
If you are on Office 365 you can check your mail and access additional mailboxes at http://email.miami.edu.

1. After signing in to http://email.miami.edu, click on your picture or the avatar in the top right corner.
2. Choose Open another mailbox… from the drop-down list.



3. In Open Other Mailbox window enter the name or address of the mailbox you wish to view, i.e. browardcanes@miami.edu,* and press Enter.

4. The name should populate, or you should receive a list of names. If a list of name appears, select the appropriate name. Click Open.



* Corresponding 'Canes Community details provided in **Leadership Resource Guide Access and Password Tip Sheet**

5. The shared mailbox will be displayed in a new window.

To create an email from your 'Canes Community mailbox:

a. Go to the NEW EMAIL tab on the left top corner of your screen
b. On the screen, you will see that the FROM tab has a drop down where you will select the 'Canes Community mailbox, i.e. browardcanes@miami.edu*.
c. In the "To" box, you will enter the listserv that corresponds to your community, i.e. browardcanes@listserv.miami.edu*. NOTE: This listserv covers all alumni in that particular geographic code in the University of Miami database.
d. The subject line should include the name of the 'Cane Community and event information.
e. Always use the templates provided on Mailchimp®. These templates include privacy and opt out links that MUST be included in all mailings (see page 6).

2. **IMPORTANT:** Once you've sent your email to the correct listserv, the request will first be passed to your 'Canes Community inbox. Your inbox will automatically receive a message that includes your email as an attachment. Review the attachment and click to approve (see below):

   To cut down on spam, the BROWARDCANES list, for instance, has been configured to request positive confirmation of messages posted from email addresses not currently subscribed to the list. You must now confirm that the enclosed message did originate from you. To do so, simply reply to the present message and type "OK" (without the quotes) in the text of your message.

3. Upon clicking to approve the message, an automatic message will be sent to the alumni engagement team for final departmental approval. Approvals can take up to 2 business days. For optimal results, send your email before 10:00 a.m. on weekdays.

4. You will then receive an email notification like this (see below) confirming your message has been distributed:

   Your message dated Wed, 13 May 2020 18:10:03 +0000 with subject "FW: Broward 'Canes Community Event" has been successfully distributed to the BROWARDCANES list (# of recipients).

* Corresponding 'Canes Community details provided in **Leadership Resource Guide Access and Password Tip Sheet**

TERMINATION OF 'CANES COMMUNITY MASS E-MAIL ACCESS

All 'Canes Community Executive Board members with administrative access to the 'Canes Community Mass E-mail System are subject to having their access terminated by the UM Alumni Association for non-compliance with 'Canes Community Mass E-mail Process guidelines.

NON-UNIVERSITY MASS E-MAIL DATABASES/LISTS

It is strictly prohibited for 'Canes Communities to maintain and/or send out mass e-mails using any external or "shadow" databases and/or e-mail lists that are not part of the 'Canes Community Mass E-mail Process. Use of these non-University databases/e-mail lists is a violation of the University of Miami Privacy Policy and may result in the termination of 'Canes Community Mass E-mail access and suspension of 'Canes Community leadership role until corrective measures are taken.

GUIDELINES

- Information/content sent via the 'Canes Community Mass E-mail Process should only pertain to the promotion and announcement of UM or 'Canes Community sponsored events and programs. This forum is not meant for personal messages or commentary of any kind. It is important to remember that you are reaching a wide variety of constituents and you should use discretion in your outreach.

- Mass e-mail frequency should be limited to one e-mail per week, at most. If constituents receive too many e-mails they will opt-out of receiving e-mails from the 'Canes Community Mass E-mail System, which will reduce the number of recipients on your 'Canes Community's e-mail list.

- To ensure consistency in branding, please use the pre-created e-mail templates in your MailChimp® account.

- Mass e-mails should be double-checked for spelling/grammar/content errors to ensure that all 'Canes Community e-mail communication represents the University of Miami in a positive and professional manner.

- The following items are not acceptable for inclusion in 'Canes Community mass e-mails:
    - Offensive language or images.
    - Images depicting illegal behavior, such as underage drinking.
    - Self-promoting or providing advertising links to businesses/political affiliations.
    - Language, images/videos depicting the University of Miami or UM Alumni Association in a manner that does not adhere to UM Alumni Association standards.
    - In accordance with NCAA compliance requirements, 'Canes Community are strictly prohibited from using the likeness of or referring to prospective student-athletes and/or current student athletes in any type of 'Canes Community marketing/outreach medium.

MAILBOX MANAGEMENT & COLOR CODING

OVERVIEW

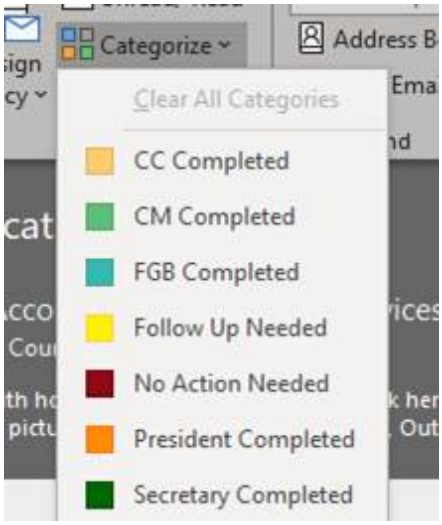
We kindly ask that all 'Canes Communities leaders with access to the mailboxes access the mailbox several times a week to respond to emails received. If unsure how to respond, please forward to your University of Miami contact. Listed below are mailbox management steps and guidelines.

Step 1: The two (2) 'Canes Community Executive Board members with access to the mailbox will work closely together to monitor the mailbox on assigned days or when one is unavailable to access.

Step 2: After replying to an email or forwarding, please add your corresponding category (below) to the email. This will confirm action.

CATEGORY BREAKDOWN ('CANES COMMUNITY LEADERSHIP)

- **President Completed** - Always add when viewed and completed.
- **Secretary Completed**- Always add when viewed and completed.
- **Follow Up Needed** - In addition to adding (President *or* Secretary Completed), add this category if email is pending reply but has been acknowledged and/or forwarded to your University contact.
- **No Action Needed** - If email is spam or action is non-applicable.



CATEGORY BREAKDOWN (UM STAFF) **

*Corresponding 'Canes Community details provided in Leadership Resource Guide Access and Password Tip Sheet

*If the email is forwarded, your University contact will add their corresponding category once completed.

Additional Resources: For additional instructions on how to access the **Categorize** tab, please click **here**. This will take you directly to the Microsoft Outlook Support page.

MAILCHIMP® EMAIL TEMPLATES

OVERVIEW

All 'Canes Communities have their own Mailchimp® account, an email marketing automation platform, with three (3) University of Miami branded email templates to utilize. The templates include a game watch invitation, community event invitation, and community update outline.

The two (2) 'Canes Community Executive Board members with access to the listservs will be able to edit and personalize the templates with specific details related to the event or community update.

WEBSITE

https://mailchimp.com/

LOGIN INFORMATION

*Provided in 'Canes Community **Leadership Resource Guide Access and Password Tip Sheet**

SAMPLE EMAIL TEMPLATES

Watch Party

GAME WATCH PARTY

EVENT TITLE
Date + Time
Location

BRIEF DESCRIPTION: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras ultrices vestibulum risus a tincidunt. Proin consequat, massa mattis tincidunt tristique, tellus purus mollis est, vel commodo est nibh vel ex. Ut sodales euismod tristique. Praesent ultrices, dui quis porta hendrerit, nisl ipsum efficitur sem, sed ultrices quam turpis ut lectus.

REGISTER TODAY!

HAVE QUESTIONS ABOUT THIS UPCOMING EVENT OR HOW YOU CAN GET INVOLVED WITH OUR 'CANES COMMUNITY?

GET IN TOUCH AT BROWARDCOUNTYCANES@MIAMI.EDU

Community Event

UPCOMING EVENTS

EVENT TITLE
Date + Time
Location

BRIEF DESCRIPTION: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras ultrices vestibulum risus a tincidunt. Proin consequat, massa mattis tincidunt tristique, tellus purus mollis est, vel commodo est nibh vel ex. Ut sodales euismod tristique. Praesent ultrices, dui quis porta hendrerit, nisl ipsum efficitur sem, sed ultrices quam turpis ut lectus.

Community Update

Feature the star of your collection first.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras ultrices vestibulum risus a tincidunt. Proin consequat, massa mattis tincidunt tristique, tellus purus mollis est, vel commodo est nibh vel ex.

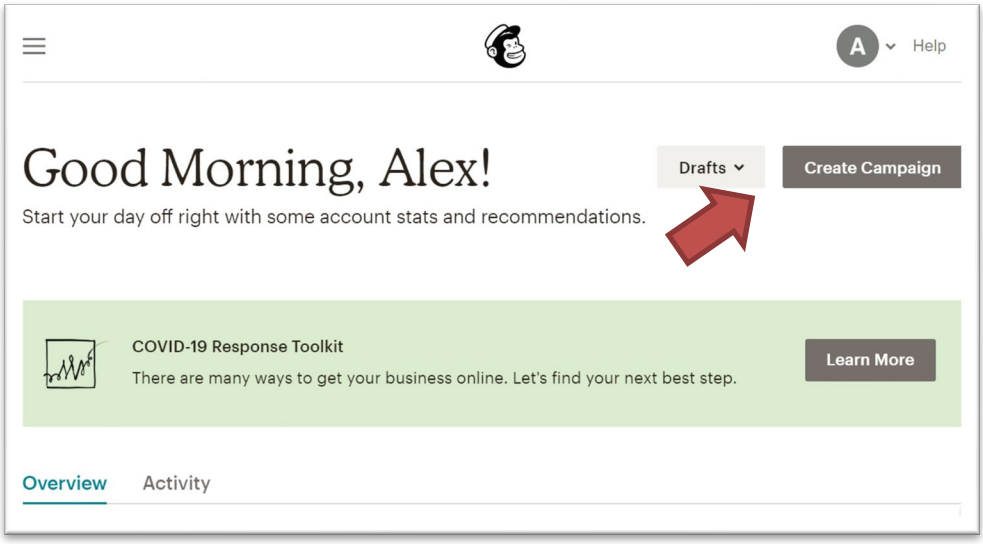
Ut sodales euismod tristique. Praesent ultrices, dui quis porta hendrerit, nisl ipsum efficitur sem, sed ultrices quam turpis ut lectus. Ut consectetur orci in est volutpat, ut dictum tortor accumsan. Phasellus dictum, augue nec luctus elementum, mauris felis malesuada nulla, id interdum libero libero ut nibh.

ENTER BUTTON COPY

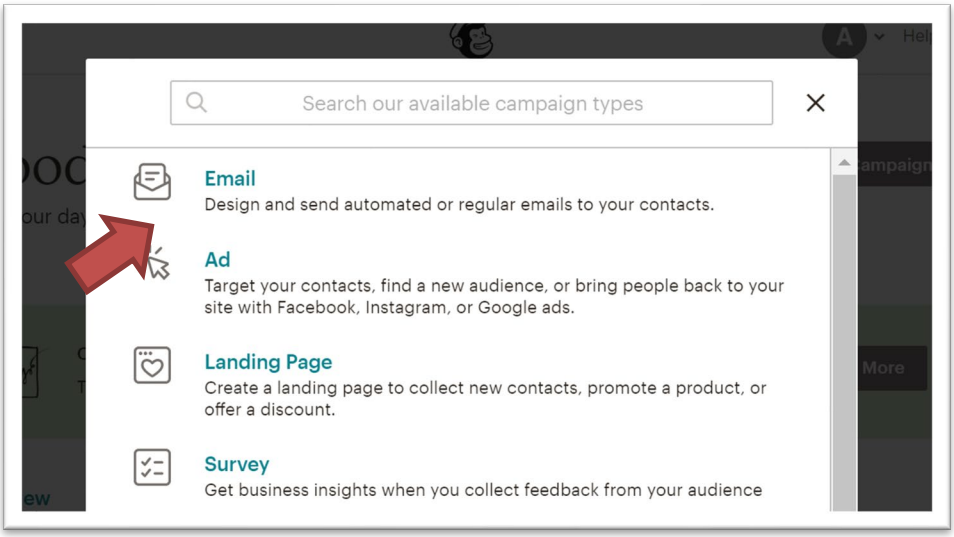
CREATING AN EMAIL

Creating an email is a simple and quick process. MailChimp® offers a user-friendly interface that makes creating and editing emails an intuitive and straightforward process.

Step 1: Create a campaign.
The first step in creating an email is creating a campaign. From your Dashboard, click the "Create Campaign" button.

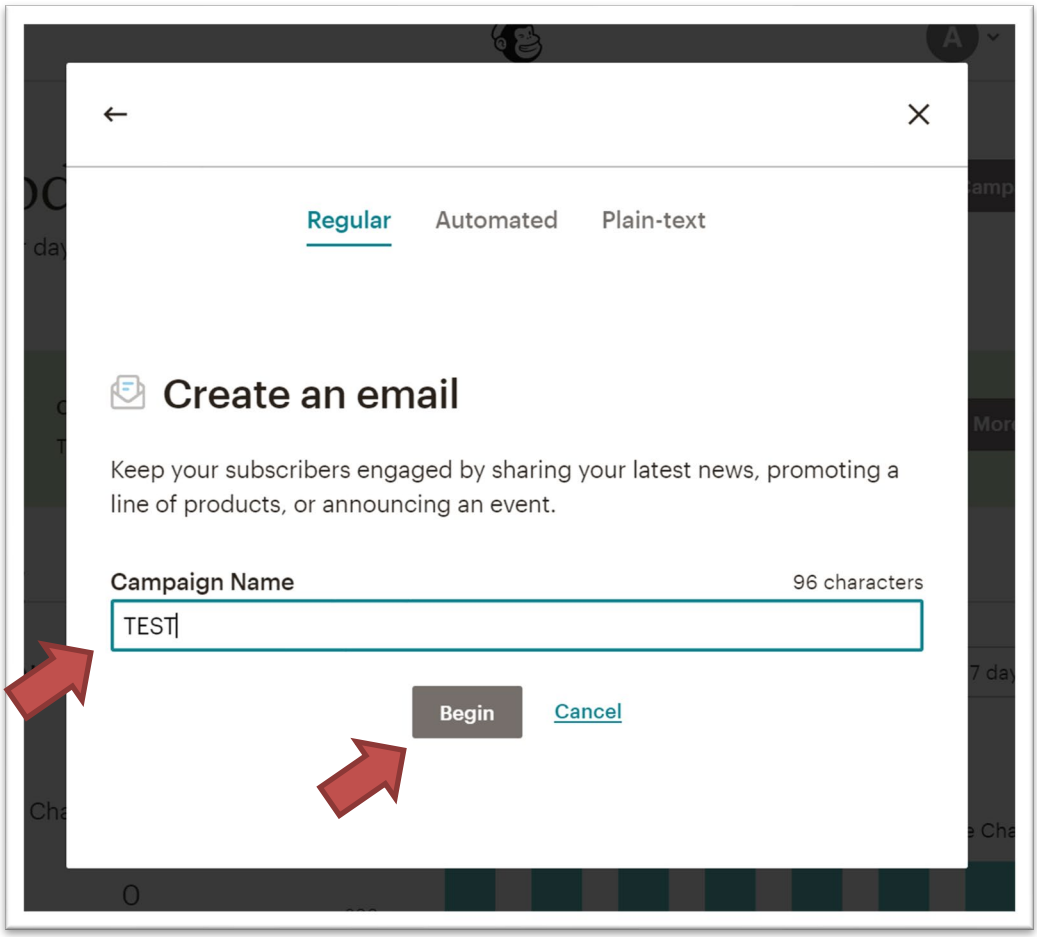


Step 2: Select Email
MailChimp® offers several types of campaign options. Select "Email."



Step 3: Naming your email.
Once you've selected email as your desired campaign type, you'll be called to name it. Best practices suggest that you lead with a date and then any relevant titling.

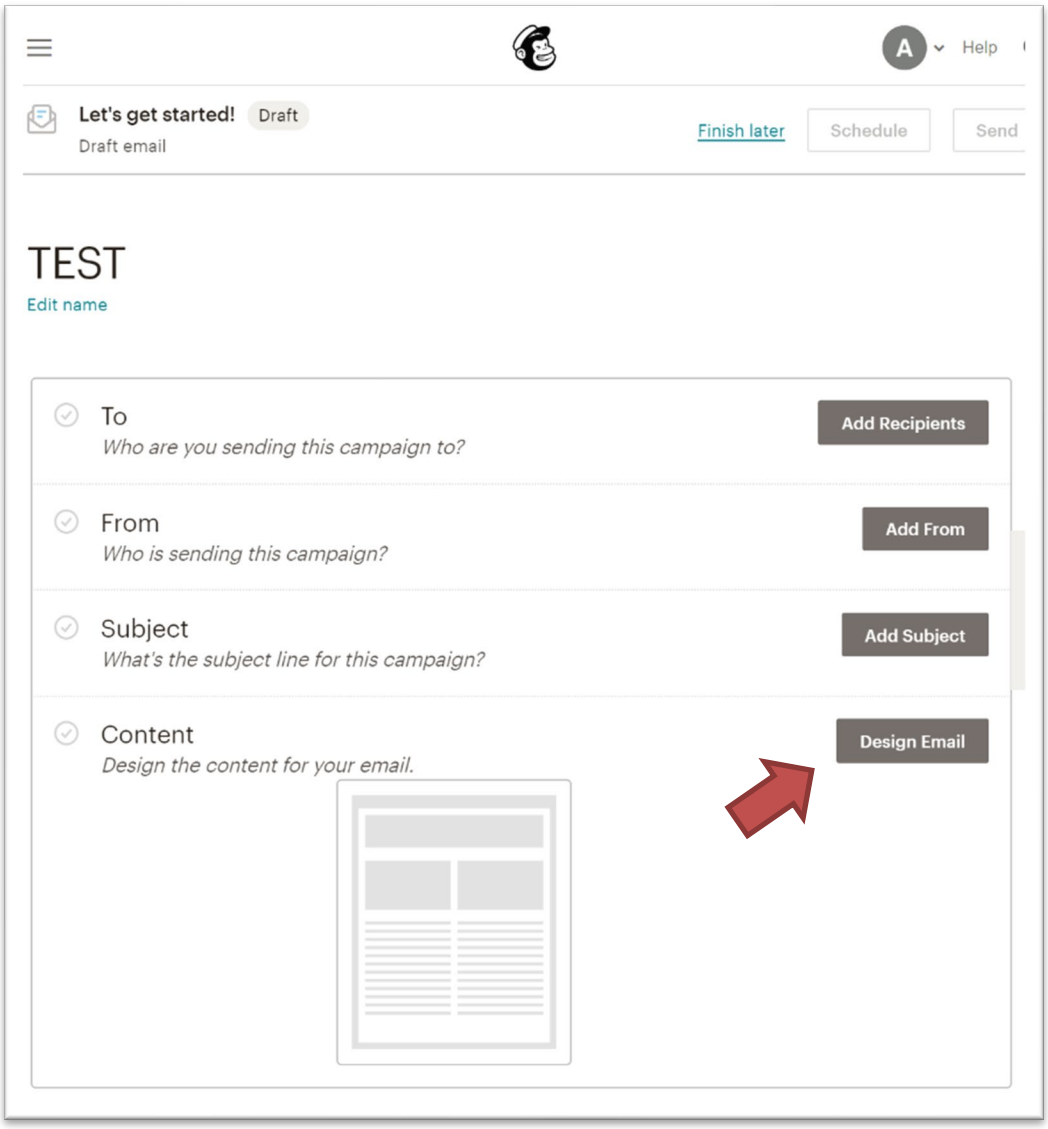
Example: YYMMDD Title of Email.



Click "Begin."

Step 4: Setting the basics
With your email campaign created, now it's time to fill in the basics. Skip the "To" field at this stage, we'll be able to handle that later.

For now, make sure that "From" is set to your respective 'Cane Community. Add your proposed subject line, and then click "Design Email" to start working on the body of your email.

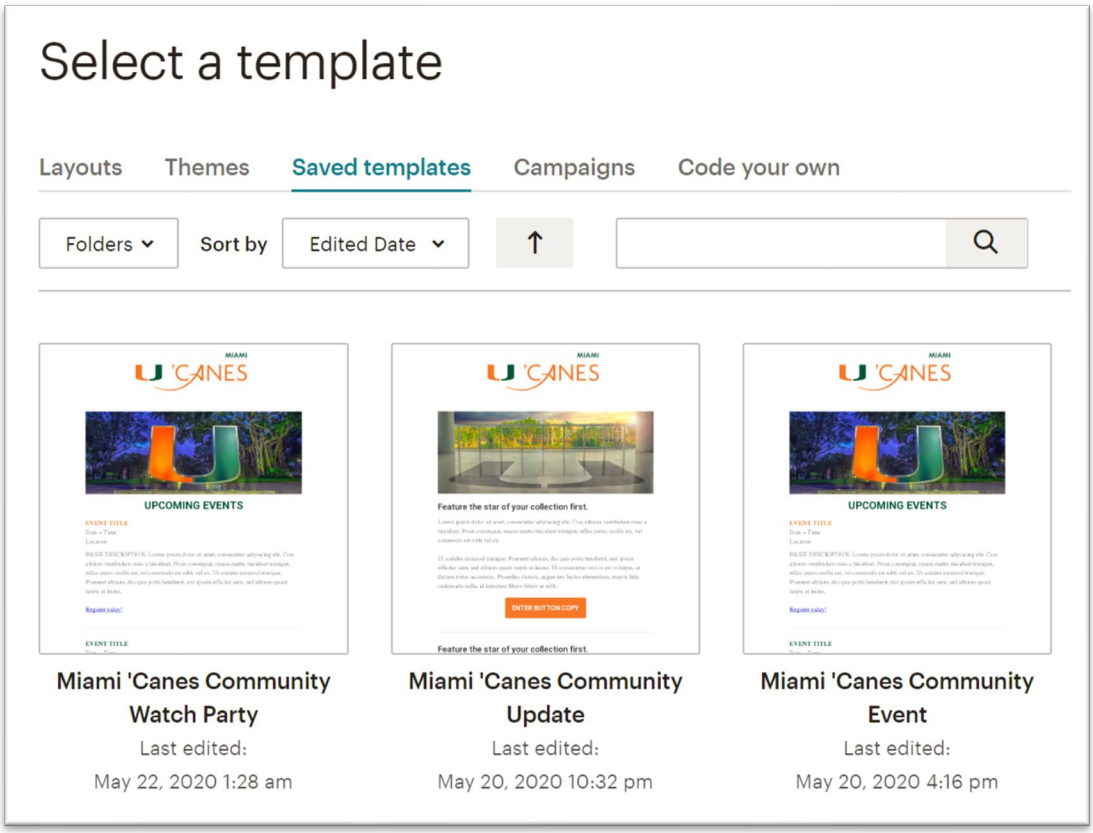


SELECTING A TEMPLATE

Step 1: Find your template.
Once you begin to design an email, you will have the option to select to design it from scratch, from prebuilt MailChimp® templates, and from your 'Cane Community templates. All communications should, and more importantly *can*, be built from one of the three pre-built **'Cane Community templates**. These are: Community Update, Event, and Watch Party.

To find your 'Cane Community templates, select "Saved templates" from the submenu.

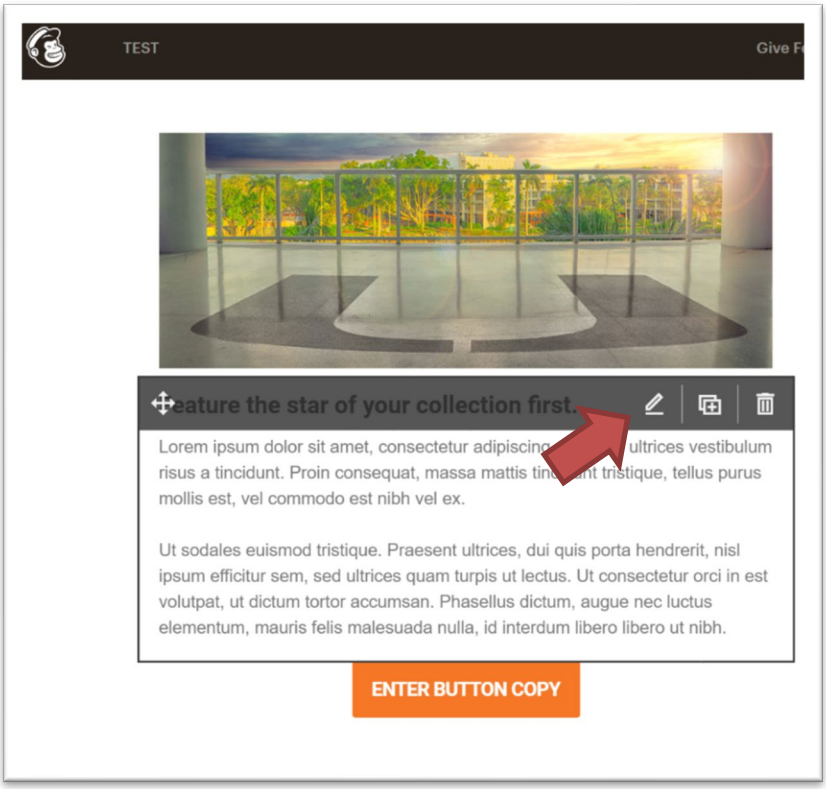
Once you've navigated to Saved template you will see your localized 'Cane Community templates.



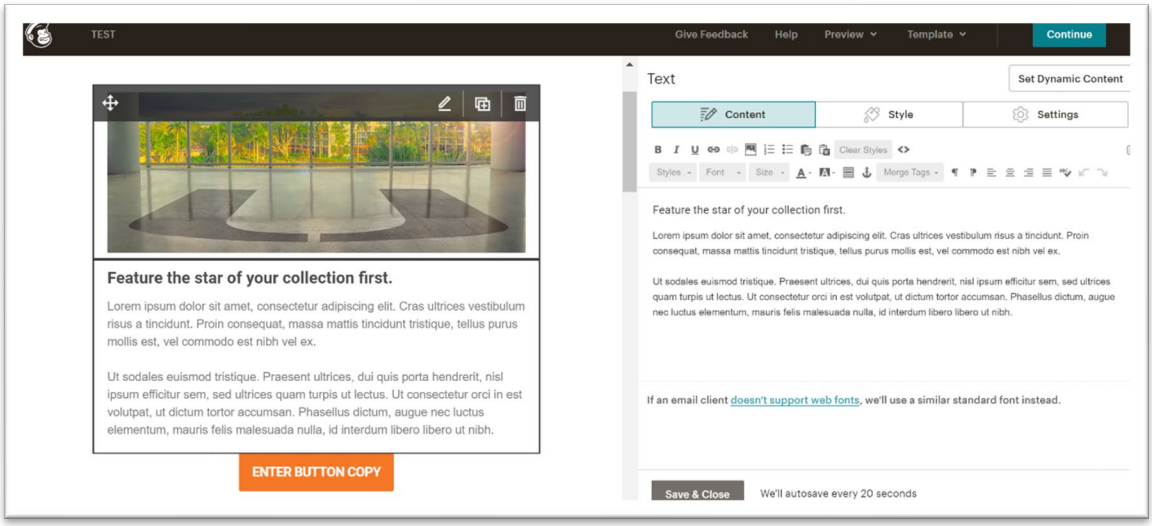
With your template selected, you can now begin to edit your content.

EDITING A TEXT BLOCK

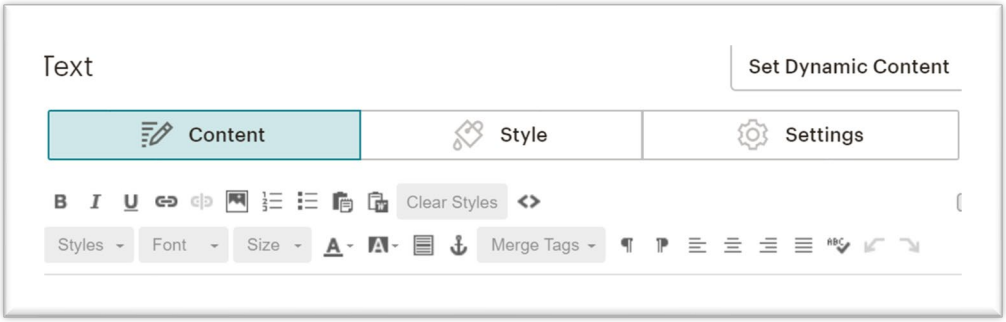
Step 1: Opening the edit block.
Scroll over the text block you'd like to edit and click on the pencil icon.



Step 2: Editing content.
Once the pencil icon is selected the WYSIWYG (What You See Is What You Get) editor will open.

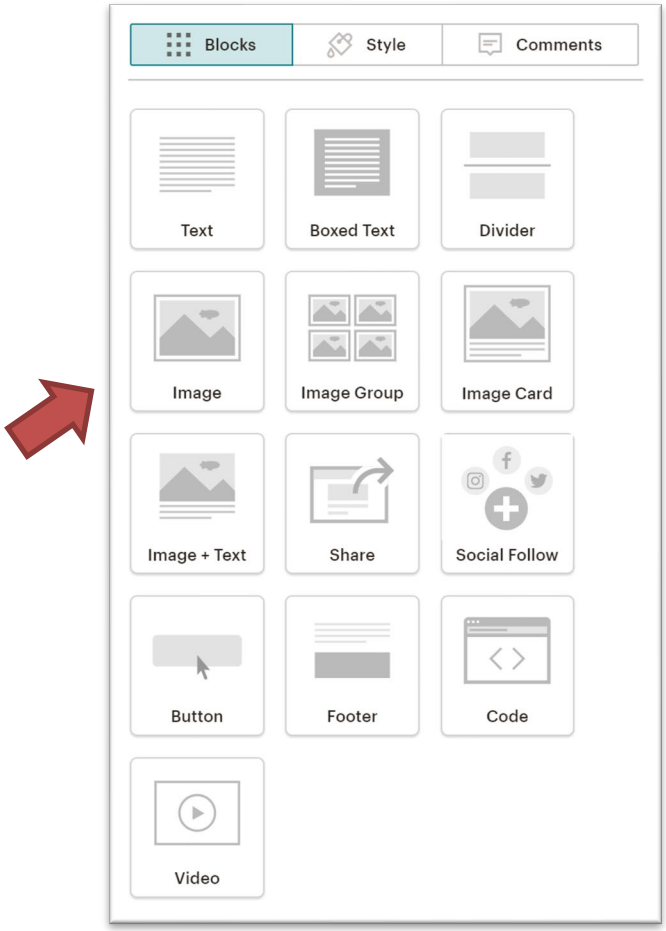


Utilize the WYSIWYG to edit content including, but not limited to, updating copy, adding links, and stylizing the text.

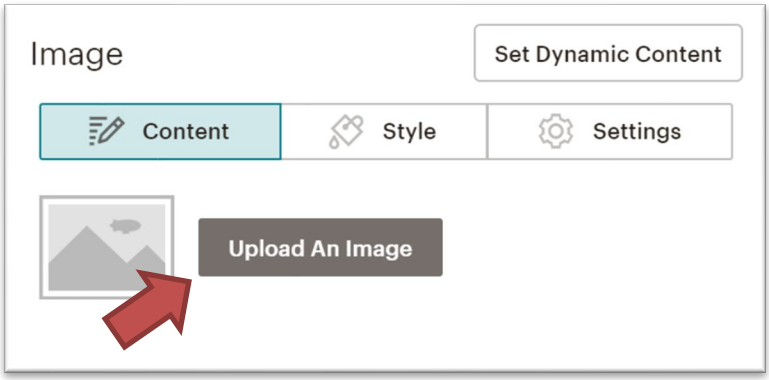


ADDING AN IMAGE

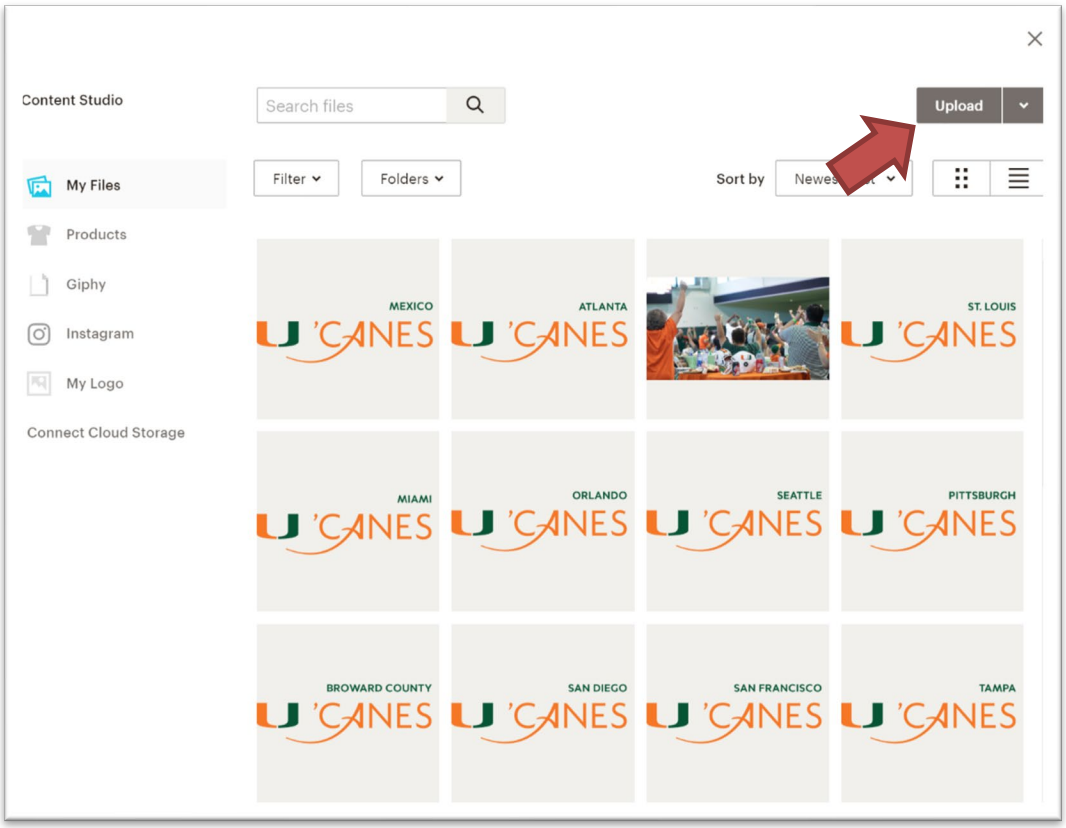
Step 1: Add an image block.
To add an image block, ensure that you are not actively in the editing window of another content block. From the main content menu (to the right of the interface) drag and drop an “Image” block into the email at the spot where you would like the image to appear.



Step 2: Upload or select an image.
With the image block in place, the image edit window will automatically open. Click “Upload An Image” to open the Content Studio.



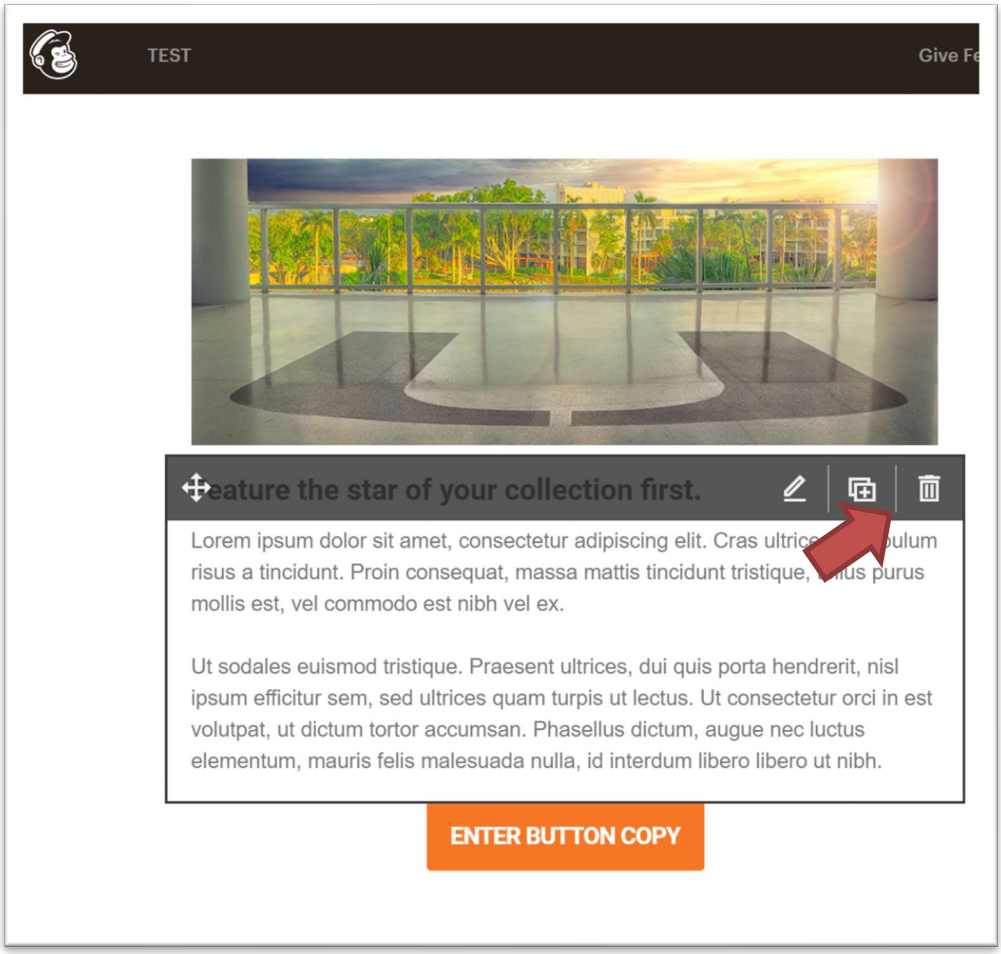
If the desired image is already available in the Content Studio, simply select the image. If you’d like to upload an image to the Content Studio, click “Upload,” navigate to the image you’d like to add in its respective folder on your computer, select it, and upload it to the gallery.



Once the image has been added to Content Studio, select “Insert” to add it to your Image block.

DELETING A CONTENT BLOCK

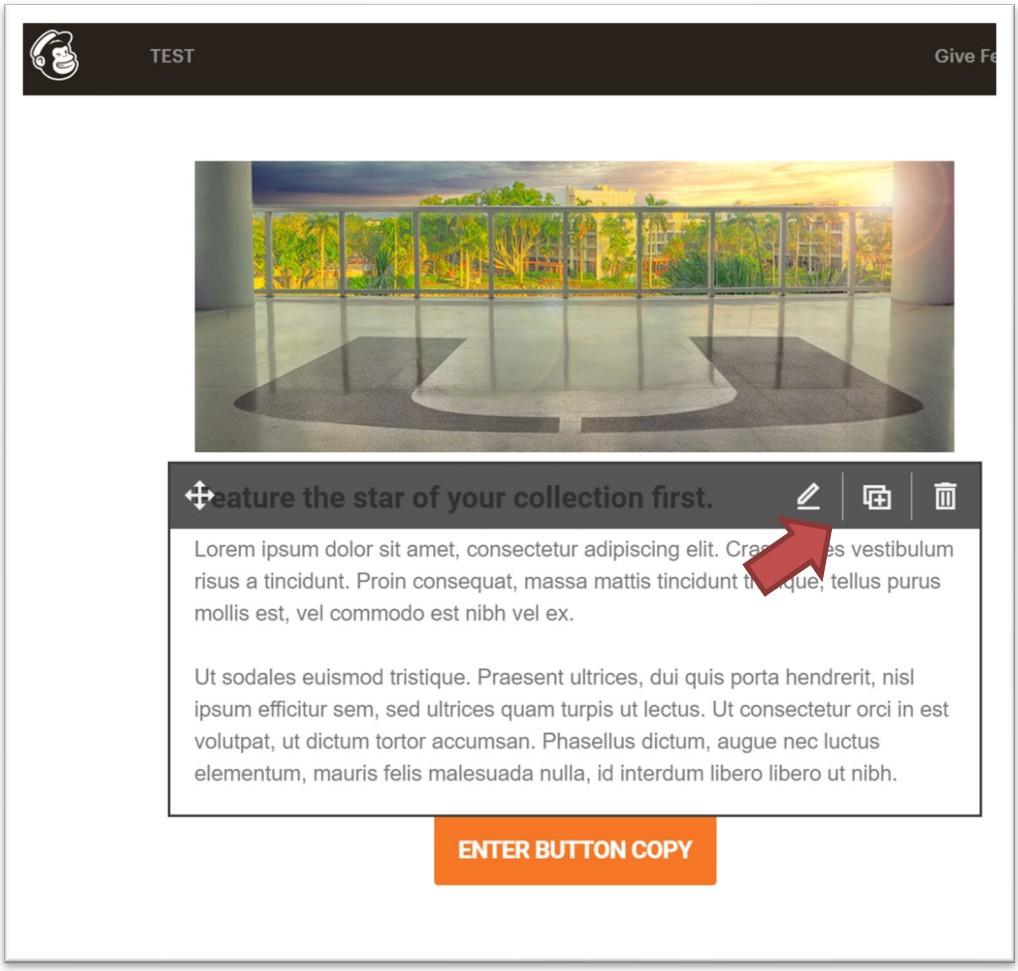
Step 1: Find the garbage can.
To delete a content block, hover over the block you would like to delete and click the garbage can. The system will then ask you to confirm your desire to delete the block via pop up.



***Note**: This action works for all types of content blocks from text, to buttons, to images.*

DUPLICATING A CONTENT BLOCK

Step 1: Find the copy icon.
To duplicate a content block, hover over the block you would like to duplicate and click the copy icon between the pencil and garbage can icons.

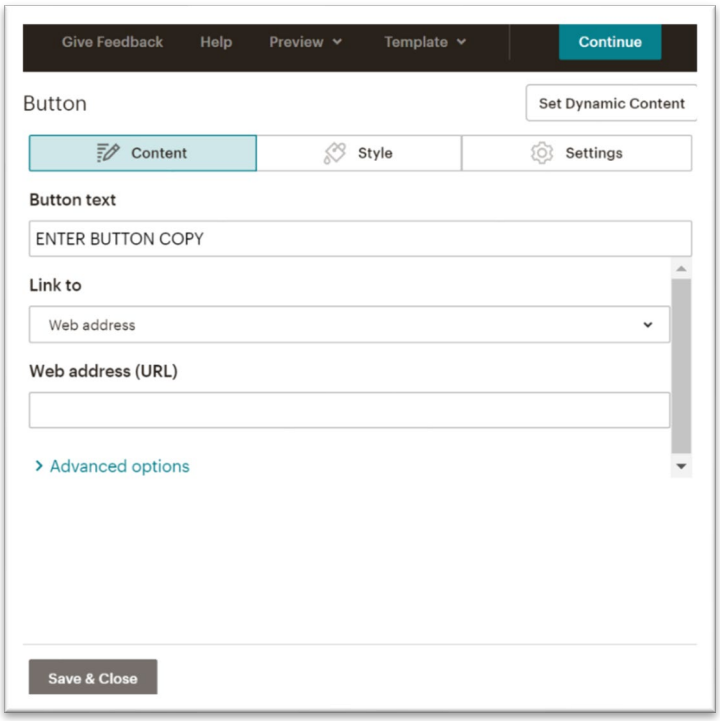


***Note**: This action works for all types of content blocks from text, to buttons, to images.*

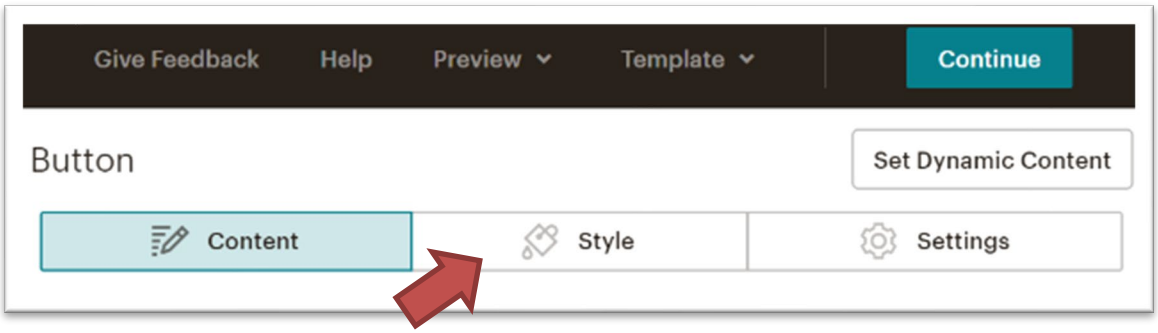
UPDATING A BUTTON

Step 1: Edit the content block.
Buttons are their own form of content block, therefore editing them is the same as any other form of content block. Hover your curser over the content block and then click the pencil icon that appears in the top right corner of the block.

The button editing window will then appear. Here you can update the copy in the button via the "Button Text" field, select the type of link (e.g. Web address), and then set the button's destination via the "Web address (URL)" field.



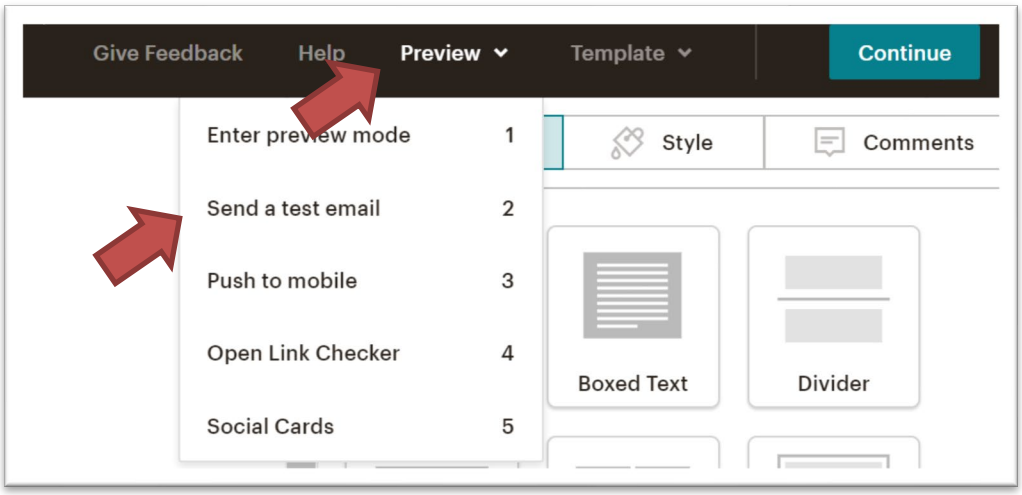
To change the button color, navigate to the "Style" tab in the button editing window.



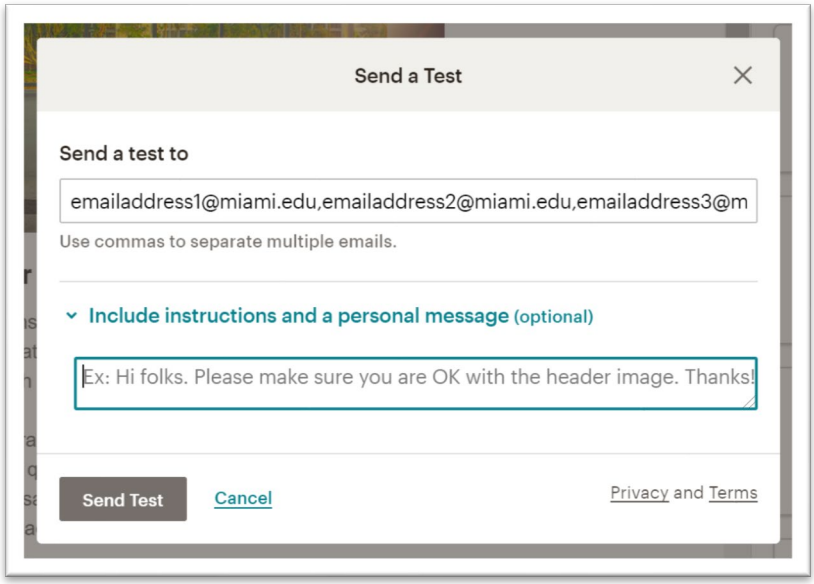
SENDING A TEST EMAIL

Step 1: Preview your email.
Sending a test email is considered a preview function. To access the test email function, select "Preview" from the master navigation along the top of your page.

From the "Preview" dropdown, select "Send a test email".



Step 2: Fill in your test list.
Last step in sending a test email is identifying who should receive the test email. List all recipients in the "Send to a test to" field, separating each with a comma. You have the option to add a message that will appear above the email. (*This is **not** required to send a test email.*) When ready, hit "Send Test" and check your respective 'Cane Community inbox. If the email is ready and no revisions are needed, you can follow the listserv distribution steps (page 2) in order for the Regional Engagement team to review and distribute.



ZOOM® MEETINGS

OVERVIEW

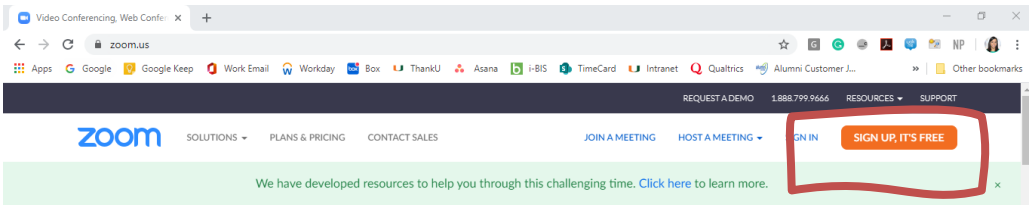
Virtual meetings, specifically Zoom®, have become a new normal during this time and below are instructions on setting up, managing, and using the features on the platform.

SETTING UP THE ZOOM APP

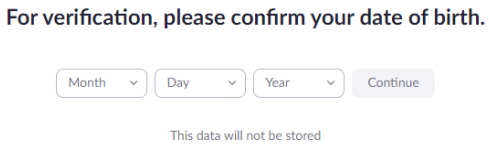
Create an account

Step 1: Go to the Zoom website: https://zoom.us

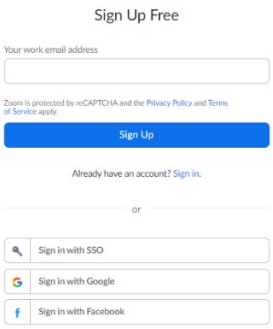
Step 2: In the upper righthand corner of the webpage, click "Sign up, It's Free."



Step 3: Enter your date of birth (this data will not be stored).



Step 4: Enter a valid email to be associated with the Zoom account. You can also use your Google or Facebook account to sign-up!



Step 5: A confirmation email will be sent to that address with an "Activate Account" link. Follow the steps in the email to finalize the account.

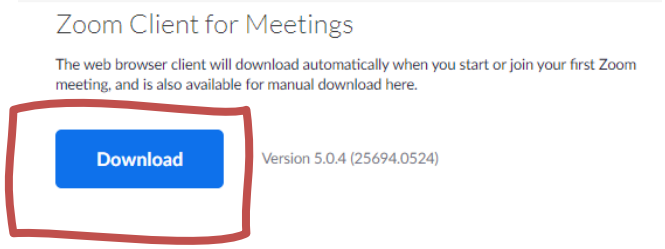
PRO TIP: The confirmation email may take a while to be sent, so be sure to create an account well in advance of the first meeting.

DOWNLOAD THE ZOOM APP TO A COMPUTER

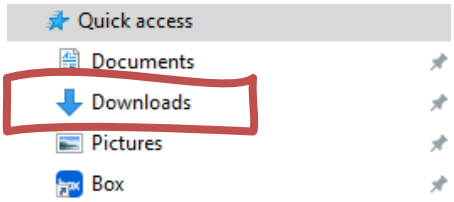
Step 1: On the Zoom website (https://zoom.us), scroll to the very bottom of the webpage.

Step 2: In the "Downloads" column, click the "Meetings Client" link (outlined in orange below).

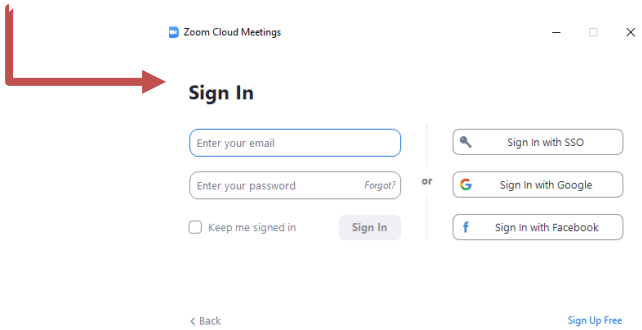
Step 3: Click download under Zoom Client Meetings



Step 4: In the computer's "Downloads" folder, open the "zoomusInstaller.pkg" in a mac "zoomusInstaller.exe" in a PC or file to launch the Zoom app.



Step 5: Sign in using the previously created account information.



PRO TIP: When signing in, select the "Keep me logged in" option for future ease of use.

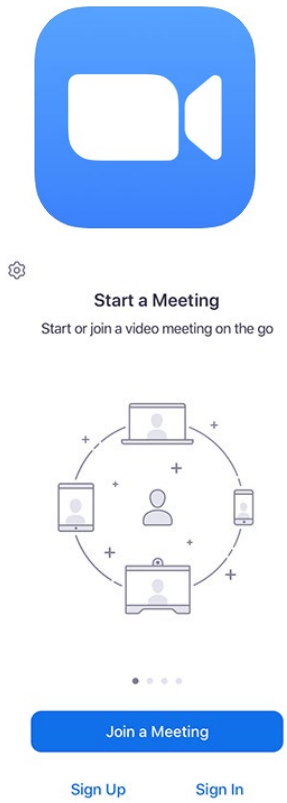
DOWNLOAD THE APP TO A SMARTPHONE

Step 1: In the App Store (for iPhones) or Google Play Apps (for Android), search "Zoom." The results may call it "Zoom" or "Zoom Cloud Meeting."

Step 2: Download the app. (The app icon can be seen to the right.)

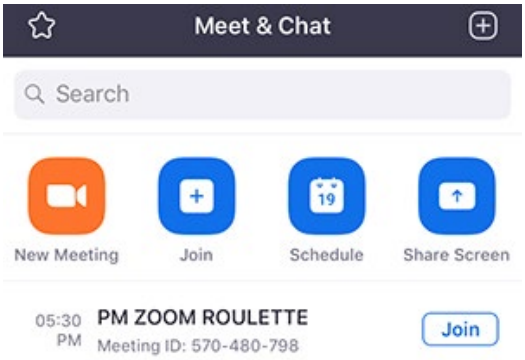
Step 3: Tap the Zoom icon on your device to launch the app.

Step 4: You will be given the option to **"Sign In"** or "Join a Meeting." Selecting "Sign In" will allow you to host, schedule, and join a meeting.



PRO TIP: Once you log in using the Zoom account you created, you will be asked: "Zoom would like to send you notifications. If you choose "allow," you will receive a notification when you are invited to meetings, etc.

Step 5: Selecting **"Join a Meeting"** will prompt you to enter a **Meeting ID** number for the meeting you are trying to join. You will also be asked for a Meeting Password if the meeting has one.

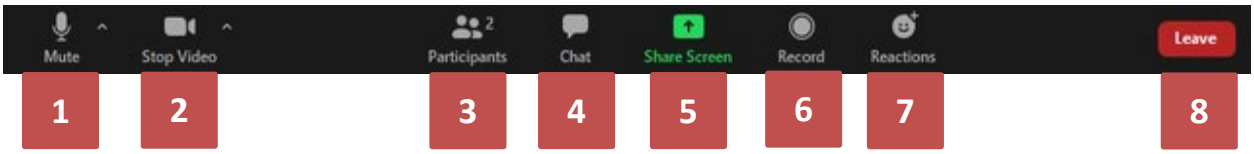


PRO TIP: The host of the meeting provides the Meeting ID.

Meeting ID: XXX XXXX XXXX
Password: XXXXXX

If the invitation has a link, the link already has the meeting ID and password embedded.

ZOOM MEETING CONTROLS



1. Click to mute/unmute your microphone. You can also click the “chevron” (^ next to the microphone icon) to open audio settings. Here you can change speaker and microphone settings.

2. Click to start/stop your camera. You can also click the “chevron” (^ next to the camera icon) to open video settings. Here you can change your camera settings.

3. Click to show a list of participants in the meeting. From here, you can also invite individuals to the meeting if the host of the meeting allows.

4. Click to open the Chat panel where you can start or respond to a chat. You can select to chat with “everyone” or with a participant by selecting his/her name.

5. Click to start sharing your desktop display or any window/application on your computer with others in the meeting (only if the host allows).

6. Click to record your meeting. Only available to meeting hosts or persons designated to record. Please note, if you will record a meeting for your community, please give participants the proper notice/warning you will do so (i.e. in your meeting invite/notice).

7. Meeting participants can now react during a meeting by sending a thumbs up or clapping to communicate without interrupting the meeting. Reactions will disappear after 5 seconds.

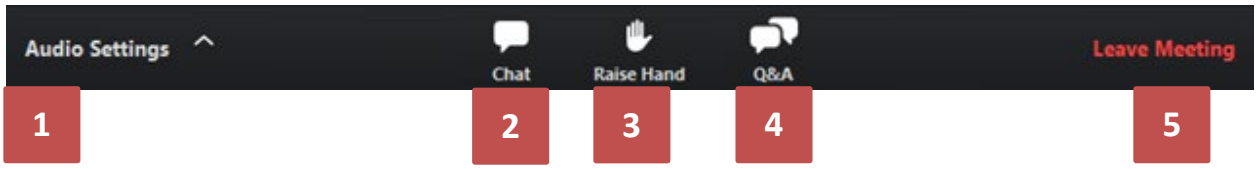
8. Click to leave or end the meeting. Leaving the meeting will allow participants to remain in the meeting room, and ending the meeting will disconnect all participants from the meeting room.

ZOOM WEBINAR CONTROLS

The Meeting and Webinar platforms offer similar features and functionality, but have some key differences.

Meetings are designed to be a collaborative event with all participants being able to screen share, turn on their video and audio, and see who else is in attendance.

Webinars offered in the paid Enterprise Zoom plan are designed so that the host and any designated panelists can share their video, audio and screen. **Webinars allow view-only attendees**. They have the ability to interact via Q&A, chat, and answering polling questions. The host can also unmute the attendees. Attendees in webinars, cannot rename themselves as well.



1. Audio Settings (only visible if the host hasn't granted you permission to talk): Change your audio settings. You can also click the “chevron” (^) next to change your speaker. **Unmute/Mute:** If the host gives you permission, you can unmute and talk during the webinar. All participants will be able to hear you. If the host allows you to talk, you will receive a notification.

2. Chat: Open in-meeting chat, allowing you to send chat messages to and send a message to the host, panelists, and attendees (if permitted by the host).

3. Raise Hand: Raise your hand in the webinar to indicate that you need something from the host. The host may instruct you on how they plan to use this. Many webinar hosts use this feature to know if an attendee has a question and would like to speak out loud.

4. Question & Answer: Open the Q&A window, allowing you to ask questions to the host and panelists. They can either reply back to you via text in the Q&A window or answer your question live.

5. Click to leave or end the meeting.

SOCIAL MEDIA FOR ’CANES COMMUNITIES

OVERVIEW

The University of Miami does not manage any existing ‘Canes Communities social media accounts including but not limited to Facebook, Instagram, LinkedIn, and Twitter.

Although the University of Miami Regional Engagement Team monitors the existing social media accounts for compliance; new and existing accounts are managed by select members of the ‘Canes Communities. Management is up to the Executive Board’s discretion.

For account login and details, please connect with the previous ‘Canes Community leaders for more information.

NEED HELP?

Contact our Regional Engagement Team at regionalengagement@miami.edu.

C.A.N.E.S. PROGRAMMING

'Canes Communities provide opportunities to regionally connect with the University of Miami. Communities are encouraged to create and implement an annual calendar of events in alignment with the University's C.A.N.E.S. guidelines. The goal is to engage alumni, parents, and friends of the U in meaningful ways within their local communities. Defined below are the C.A.N.E.S. programming categories with event suggestions, including global programs offered to all communities and supported by the Office of Engagement *(marked with an *):*

COMMUNITY: Programming opportunities for civic engagement, to make a positive impact in the community.

- 'Canes Day of Service*
- Social gatherings such as picnics, group fitness, etc.
- Civic engagement opportunities such as a beach cleanup, visiting with the elderly, etc.

AMBASSADOR: Programming opportunities increasing awareness and affinity to the University.

- Game Watch/Season Kick-Off/Tailgate Parties* (Football, Basketball, Baseball)
- Participate in high school information sessions/Miami Circle event
- Serve as a panel volunteer for Admitted Student Receptions
- Social media ambassador to increase University affinity and engagement

NETWORKING: Programming opportunities for individuals to leverage and expand their professional network.

- Global Networking Night*
- 'Canes Biz Meet and Greet
- Industry panel discussions
- Roundtable/Lunch & Learns: interviewing, public speaking, etc.

EDUCATION: Programming that promotes life-long education such as social and cultural development, skill building and community-based education.

- 'Canes Explore* (tour local educational attractions, i.e. museum, art gallery)
- Master lectures on educational topic (i.e. financial planning, glass blowing)
- Affinity specific events (i.e. LA Media and Entertainment Group)
- Meet the CEO

SUPPORT: Programming that promotes a culture of philanthropy. This includes participation in or promotion of:

- Annual Giving Day: 'Canes Community Scholarship Challenge*
- Dolphins Cancer Challenge

C.A.N.E.S. CREDIT GUIDELINES

C.A.N.E.S. Programming	CAT 5	CAT 4	CAT 3
Minimum Number of Branded Programs	5	4	3
Annual Credit (*if applicable*)	$1,500*	$1,000*	$500*

The University of Miami views 'Canes Communities volunteer leadership as an extension of the University, therefore the following excerpts of Travel & Business Reimbursement Policy are allowances and requirements in order to receive the annual C.A.N.E.S. programming credit reimbursement.

REIMBURSABLE/NON-REIMBURSABLE CHECKLIST

In order to facilitate processing, we encourage to group expenses into one reimbursement request. All reimbursable expenses must meet documentation requirements outlined in the next section.

REIMBURSABLE EXPENSES
A detailed restaurant receipt for UM branded event.
Miscellaneous event related costs such as space rental, musicians, speakers, etc.
Purchase receipt for permanent 'Canes Communities event resources such as décor, storage bins, name tags, etc.
UM branded items to use as giveaways, auction items, raffles, etc.
Expenses submitted as incurred or no later than May 1st in order to process prior to fiscal year end.

NON-REIMBURSABLE EXPENSES
A bar receipt for non-UM event without food items (ex: happy hour).
Gift cards.
Expenses submitted for reimbursement more than 12 months after expenses were incurred.

DOCUMENTATION/SUBSTANTIATION REQUIREMENTS

To satisfy substantiation requirements, all reimbursements must include an explanation of the business purpose for the expense and original receipts detailing the date, place, event attendees, and amount of the expense.

ENTERTAINMENT EXPENSE

Documentation of reimbursable entertainment expenses submitted must include the original itemized receipt. Monthly credit card statements alone are not acceptable as backup documentation. Names of persons entertained, their relation to the University or other affiliation, dates, and business topics discussed or business purpose for the entertainment also need to be entered in the Expense Report. Additional substantiation of expenses may be requested if the relationship is not clearly indicated.

For large groups, individuals have the option of (1) identifying each attendee by name or (2) identifying the group by a recognizable or known group name and including the number in attendance.

**Pending approval of the University's revised fiscal year 2021 budget due to COVID-19 financial impact.*