



# LEADERSHIP RESOURCE GUIDE

2022 - 2023 (FY23)

'C A N E S  
COMMUNITIES

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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.

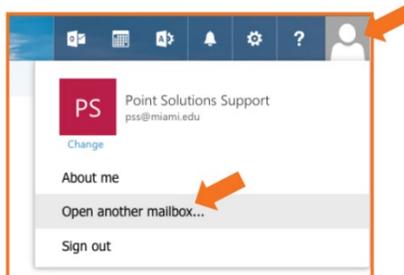
**Important:** Users with administrative access are responsible for ensuring that all confidentiality and mass e-mail guidelines (page 4) are followed on behalf of the 'Canes Community. It is strictly prohibited for users with administrative access to give their access to an unauthorized user.

### 'CANES COMMUNITY MASS E-MAIL SYSTEM TRAINING

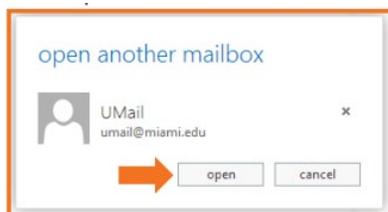
#### Outlook Web Access (email.miami.edu)

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 the Open Another Mailbox window, enter the name or address of the mailbox you wish to view, i.e., [browardcountycanes@miami.edu](mailto:browardcountycanes@miami.edu)\*, and press Enter.
4. The name should populate, or you should receive a list of names. If a list of names appears, select the appropriate mailbox 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., [browardcountycanes@miami.edu](mailto:browardcountycanes@miami.edu)\*
  - c. In the "To" box, you will enter the listserv that corresponds to your community, i.e., [browardcountycanes@listserv.miami.edu](mailto:browardcountycanes@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 'Canes 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).
6. **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. (See below):  
*To cut down on spam, the BROWARDCOUNTYCANES 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.*
  7. Please advise your Regional Engagement liaison (REO) that you have a pending email message/communication for approval. Once the REO approves the message, an automatic message will be sent to the regional engagement mailbox 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.
  8. Upon final departmental approval, the 'Canes community mailbox 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 County 'Canes Community Event" has been successfully distributed to the BROWARDCOUNTYCANES 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, reducing 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, or 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 Communities 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

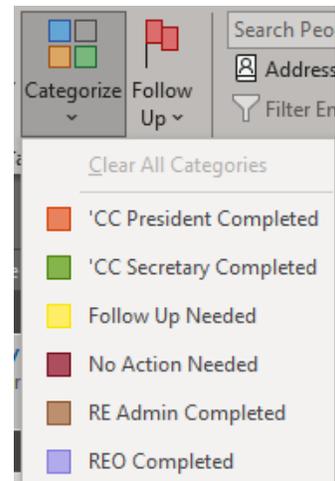
We kindly ask that all 'Canes Communities leaders with access to the mailboxes access the inbox several times a week to respond to emails received. If unsure how to respond, please forward the email to your Regional Engagement liaison. Listed below are mailbox management steps and guidelines.

**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 it.

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

### CATEGORY BREAKDOWN ('CANES COMMUNITY LEADERSHIP)

- **'CC President Completed** - Always add when viewed and completed.
- **'CC Secretary Completed**- Always add when viewed and completed.
- **Follow Up Needed** - In addition to adding (President or Secretary Completed), add this category if the email is pending reply but has been acknowledged and/or forwarded to your Regional Engagement liaison.
- **No Action Needed** - If email is spam or action is non-applicable. You can choose to delete or file it into a folder.



### CATEGORY BREAKDOWN (UM STAFF) \*\*

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

\* If the email is forwarded, your Regional Engagement liaison will add their corresponding category once completed.

**Additional Resources:** Please click [here](#) for further instructions on accessing the Categorize tab. This will take you directly to the Microsoft Outlook Support page.

# MAILCHIMP® EMAIL TEMPLATES

## OVERVIEW

All 'Canes Communities have their individual 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, a community event invitation, and a 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, nisi 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@UMAMI.EDU](mailto:BROWARDCOUNTYCANES@UMAMI.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, nisi 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, nisi 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.

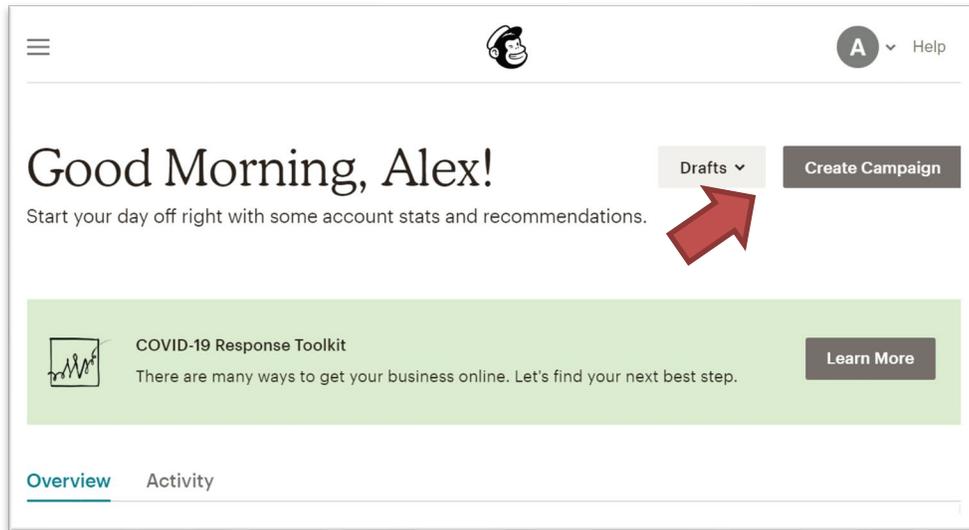
ENTER BUTTON COPY

## 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.

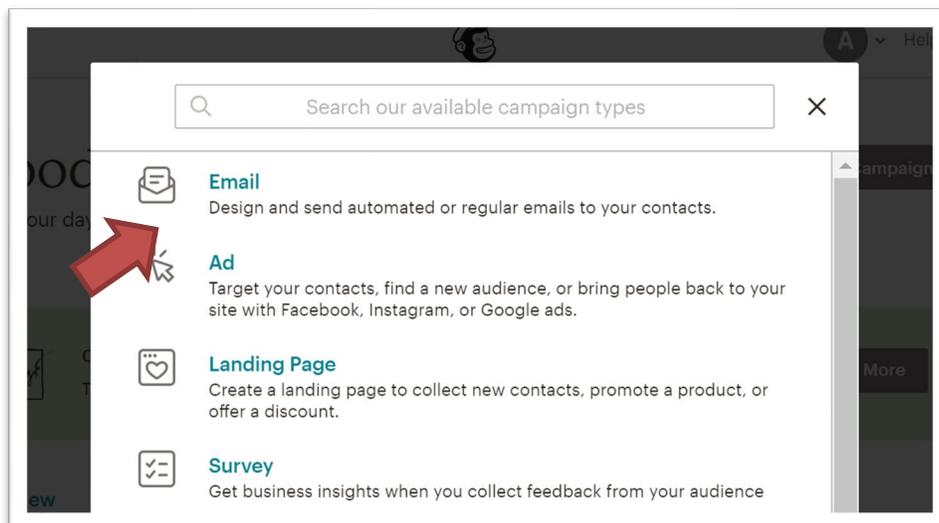
### Step 1: Create a campaign

The first step in setting up 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 prompted to name it. Best practices suggest that you lead with a date followed by any relevant titling.

*Example: YYYYMMDD Title of Email.*

← ×

Regular Automated Plain-text

**Create an email**

Keep your subscribers engaged by sharing your latest news, promoting a line of products, or announcing an event.

Campaign Name 96 characters

TEST|

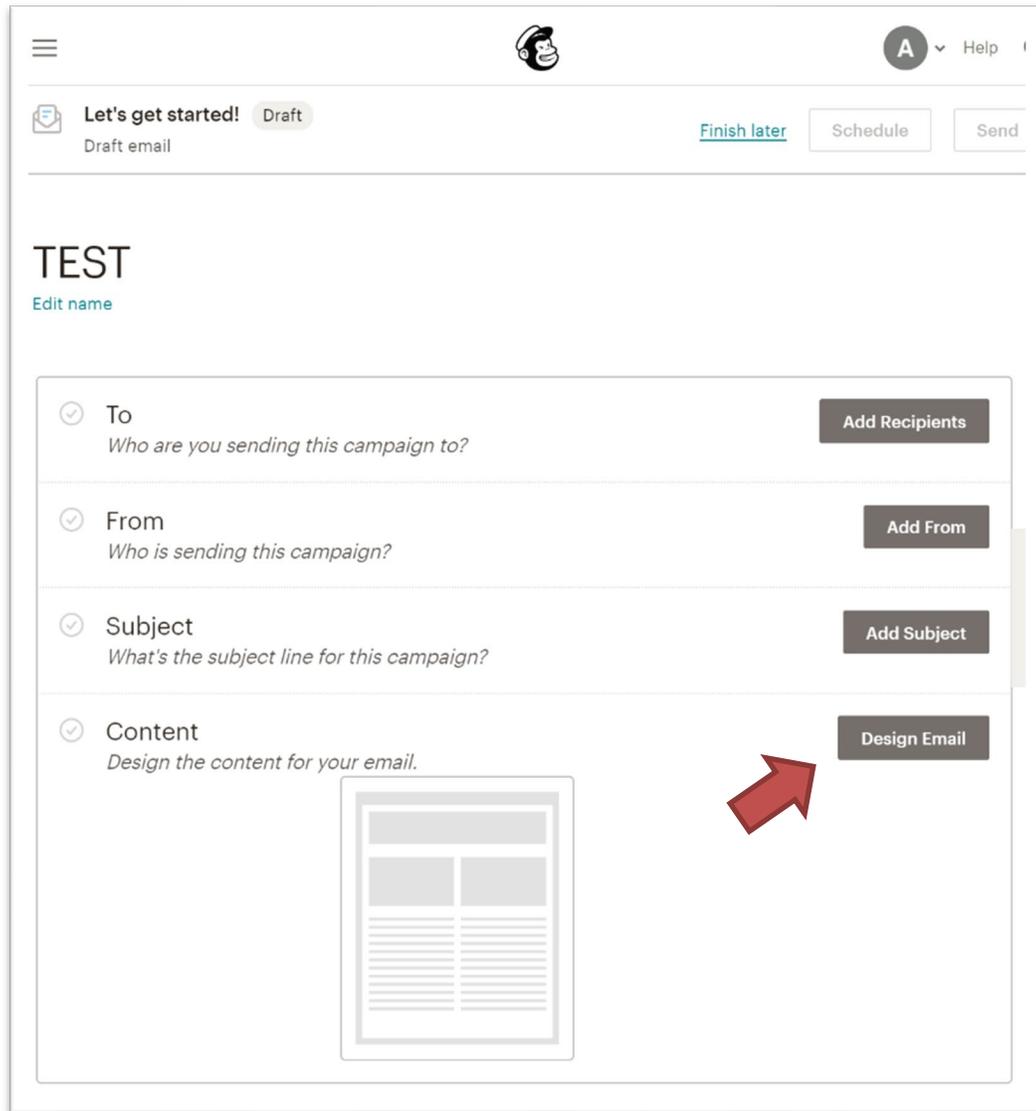
Begin [Cancel](#)

Click "Begin."

#### Step 4: Setting the basics

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

Ensure that "From" is set to your respective 'Canes Community name and email address. Add your proposed subject line, and click "Design Email" to start working on the body of your email.



The screenshot shows a web interface for setting up an email campaign. At the top, there is a navigation bar with a menu icon, a logo, and a user profile icon labeled 'A' with a dropdown arrow and the word 'Help'. Below the navigation bar, the main content area is titled "Let's get started!" with a "Draft" status indicator. To the right of the title are three buttons: "Finish later" (a link), "Schedule", and "Send".

The main content area is titled "TEST" with an "Edit name" link below it. Below the title, there are four sections, each with a checked checkbox and a button:

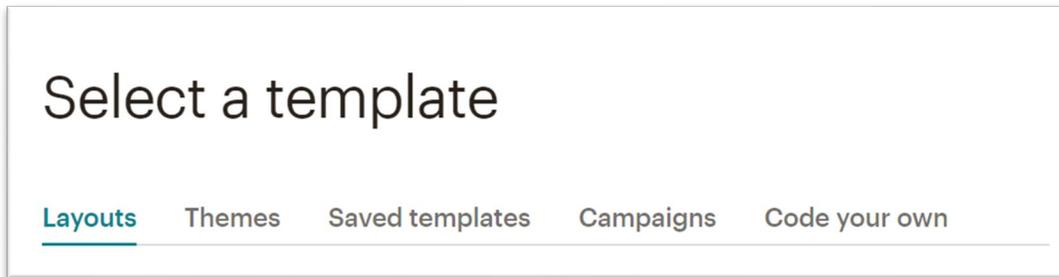
- To**: "Who are you sending this campaign to?" with an "Add Recipients" button.
- From**: "Who is sending this campaign?" with an "Add From" button.
- Subject**: "What's the subject line for this campaign?" with an "Add Subject" button.
- Content**: "Design the content for your email." with a "Design Email" button. Below the text is a placeholder image of an email layout, and a red arrow points to the "Design Email" button.

## SELECTING A TEMPLATE

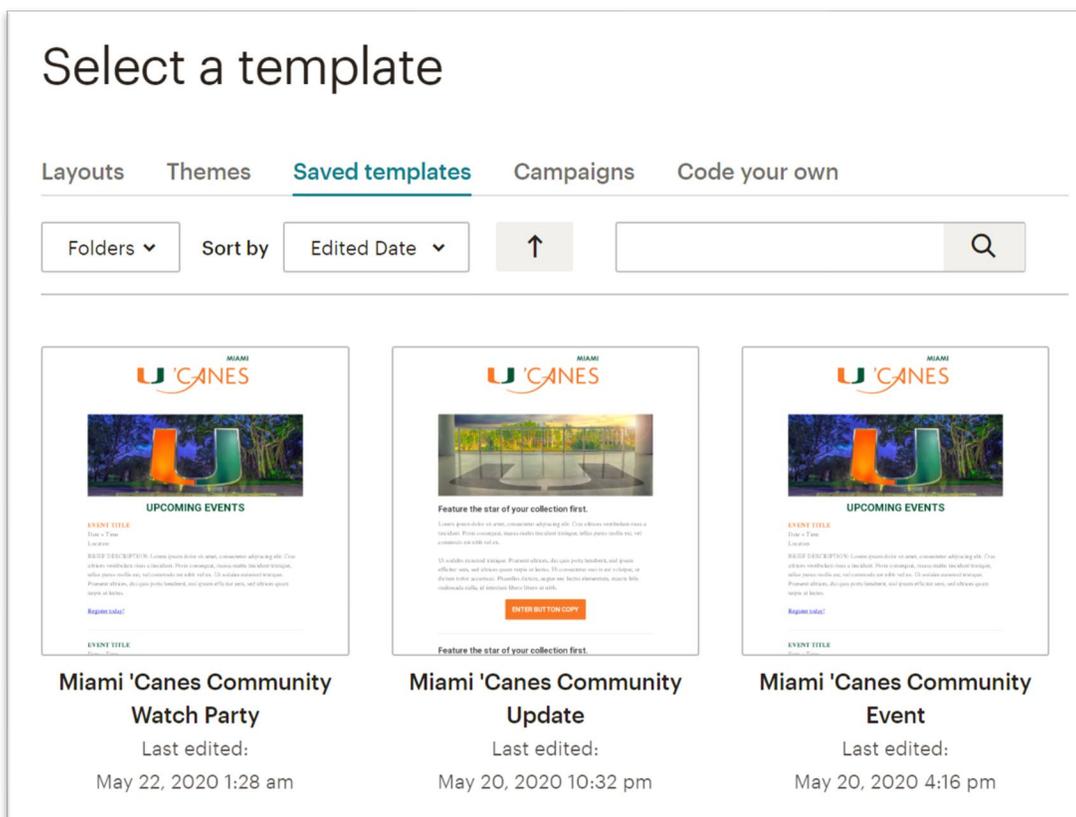
### Step 1: Find your template

Once you begin to design an email, you will have the option to design it from scratch, from pre-built MailChimp® templates, or from your 'Canes Community templates. All communications *should* be built from one of the three pre-built 'Canes Community templates. These are Community Update, Community Event, and Community Watch Party.

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



Once you've navigated to the Saved templates, you will see your localized 'Canes Community templates.

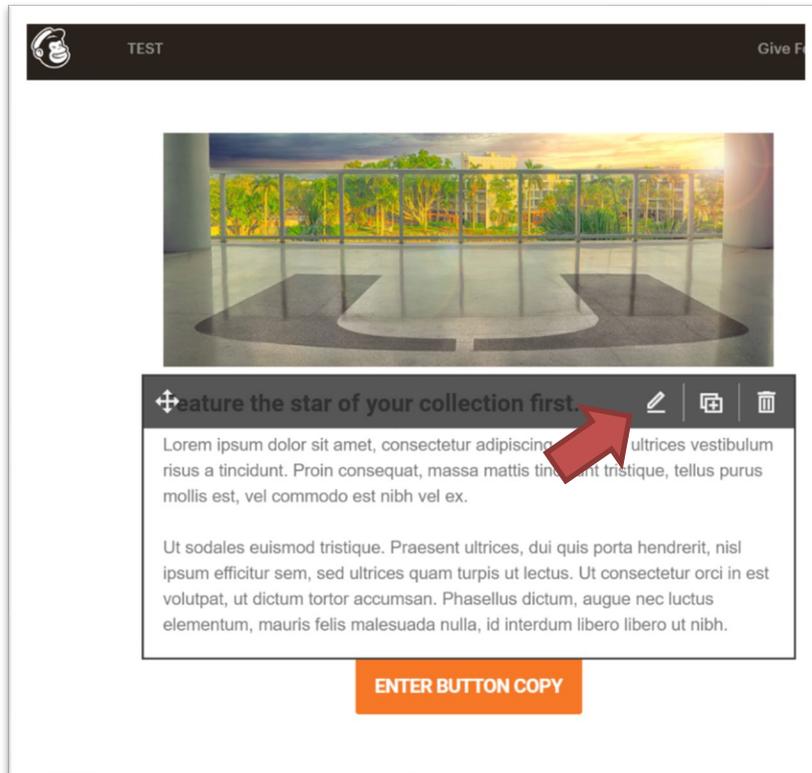


With your template selected, you can begin to edit your content.

## EDITING A TEXT BLOCK

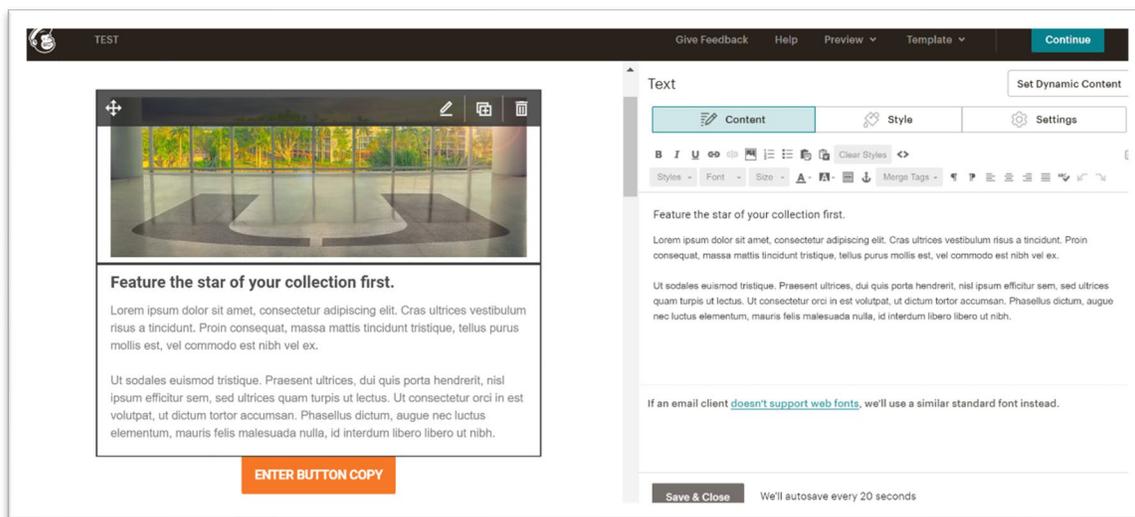
### Step 1: Opening the edit block

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

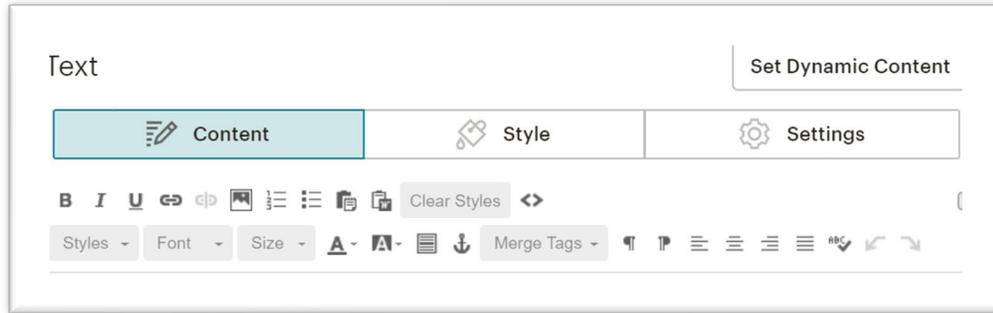


### Step 2: Editing content

Once the pencil icon is selected, the WYSIWYG (What You See Is What You Get) editor will open.



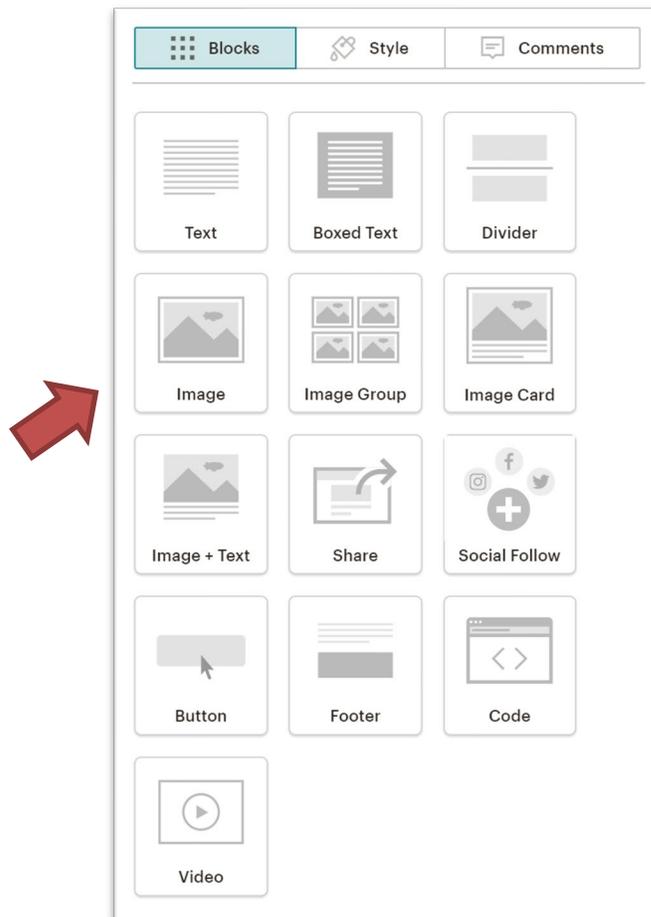
Utilize the WYSIWYG to edit content, including, but not limited to, updating copy, adding links, and stylizing the text.



## ADDING AN IMAGE

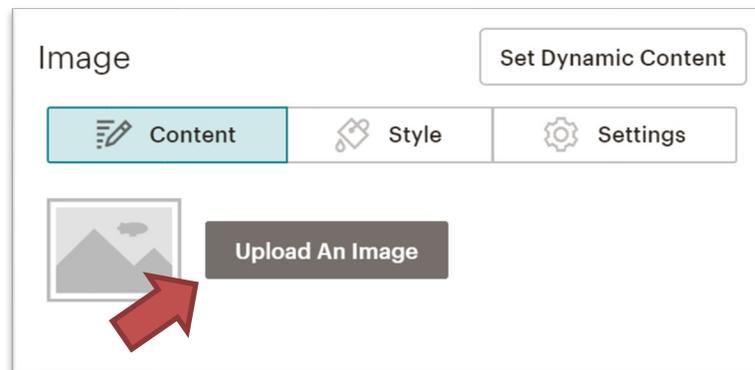
### Step 1: Add an image block

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.

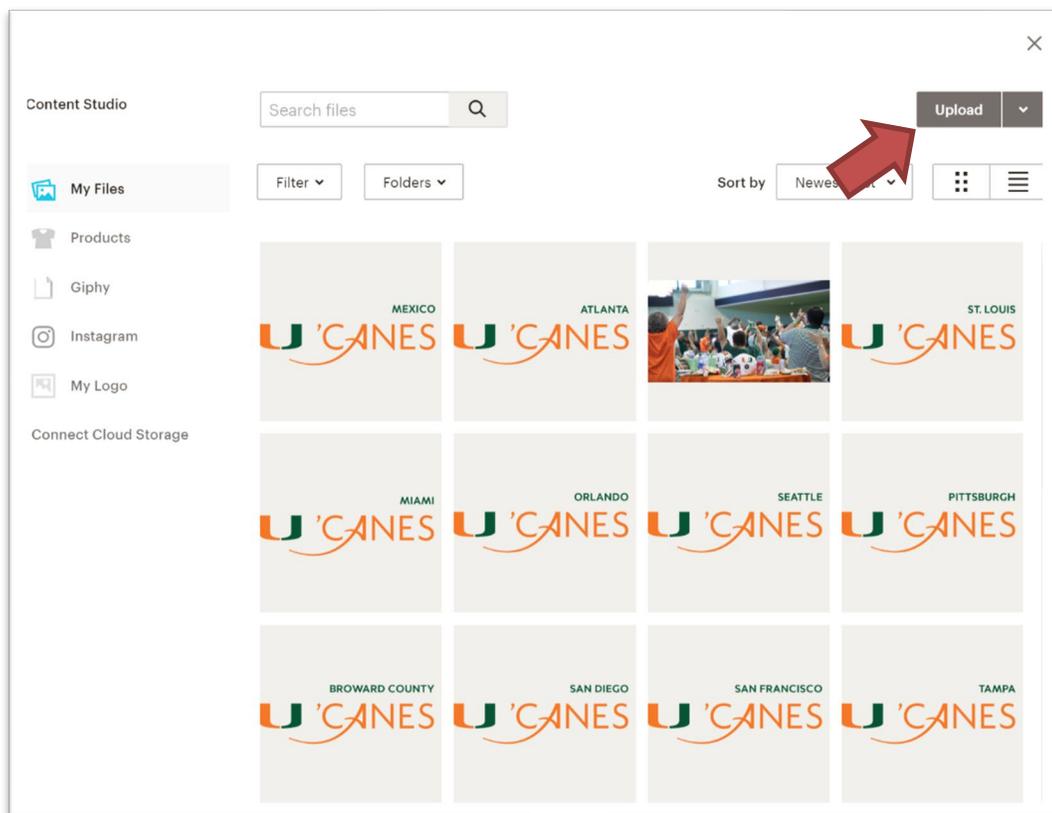


## Step 2: Upload or select an image

The image edit window will automatically open with the image block in place. Click “Upload An Image” to open the Content Studio.



Select the image if the desired image is already available in the Content Studio. 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.

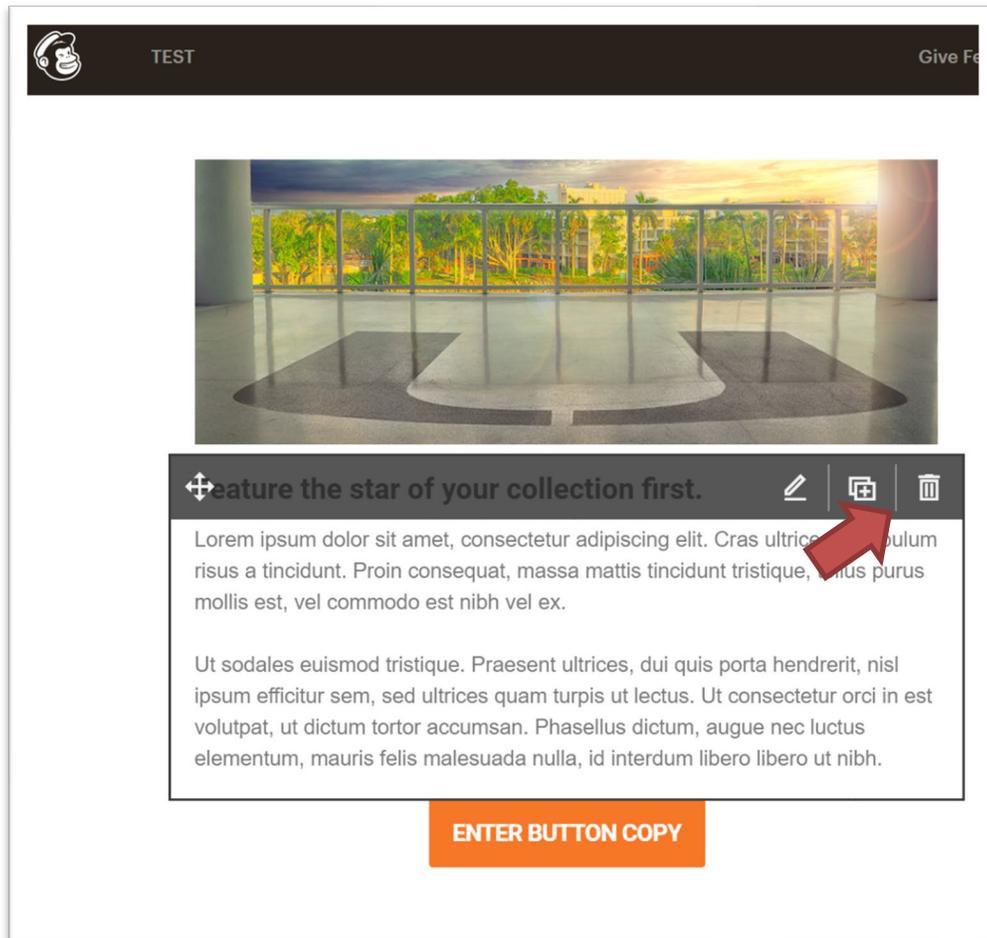


Once the image has been added to Content Studio, select “Insert” to add it to your Image block.

## 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.



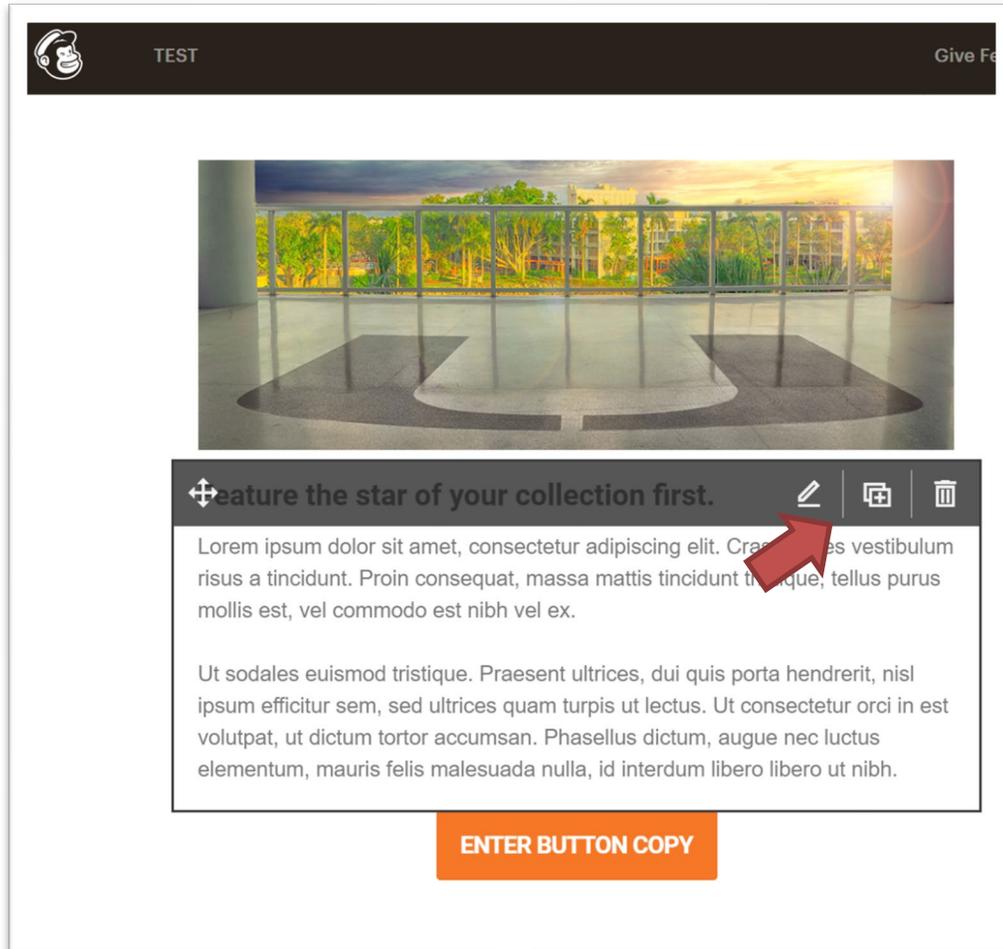
The screenshot shows a content management system interface. At the top, there is a dark header with a logo on the left, the word "TEST" in the center, and "Give Fe" on the right. Below the header is a large image of a modern building interior with a large window. Below the image is a content block with a dark header containing the text "Feature the star of your collection first." and three icons: a pencil, a plus sign, and a trash can. A red arrow points to the trash can icon. Below the header is a text area with two paragraphs of placeholder text. At the bottom of the content block is an orange button with the text "ENTER BUTTON COPY".

**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 want to duplicate and click the copy icon between the pencil and garbage can icons.



The screenshot shows a content editor interface. At the top, there is a dark header bar with a logo on the left, the word "TEST" in the center, and "Give Fe" on the right. Below the header is a large image of a modern building interior with a large window. Below the image is a text block with a dark header bar containing the text "eature the star of your collection first." and three icons: a pencil, a copy icon, and a trash can. A red arrow points to the copy icon. Below the text block is an orange button with the text "ENTER BUTTON COPY".

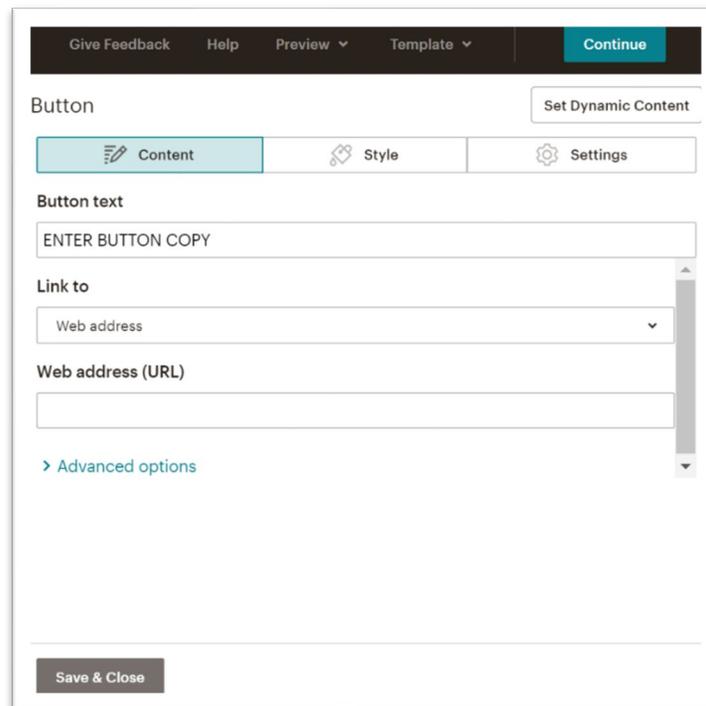
**Note:** This action works for all types of content blocks, from text, to buttons, to images.

## UPDATING A BUTTON

### Step 1: Edit the content block

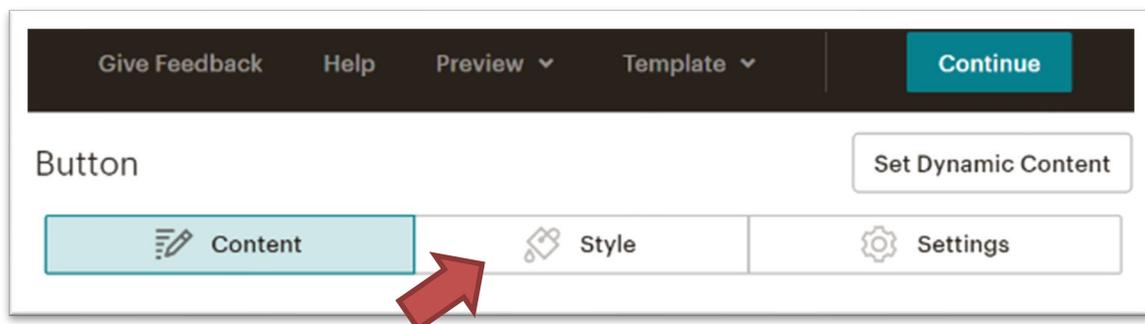
Buttons are their own form of content block; therefore, editing them is the same as any other form of content block. Hover your cursor over the content block and click the pencil icon that appears in the top right corner of the block.

The button editing window will 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 set the button’s destination via the “web address (URL)” field. Please refer to the Localist Events section (page 18) to create the event registration link.



The screenshot shows the 'Button' editing window. At the top, there are navigation links: 'Give Feedback', 'Help', 'Preview', and 'Template', along with a 'Continue' button. Below this, the 'Button' title is displayed next to a 'Set Dynamic Content' button. A tabbed interface is shown with three tabs: 'Content' (selected), 'Style', and 'Settings'. Under the 'Content' tab, there is a 'Button text' field containing the placeholder 'ENTER BUTTON COPY'. Below that is a 'Link to' dropdown menu set to 'Web address'. Underneath is a 'Web address (URL)' text input field. A link for '> Advanced options' is visible. At the bottom left, there is a 'Save & Close' button.

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



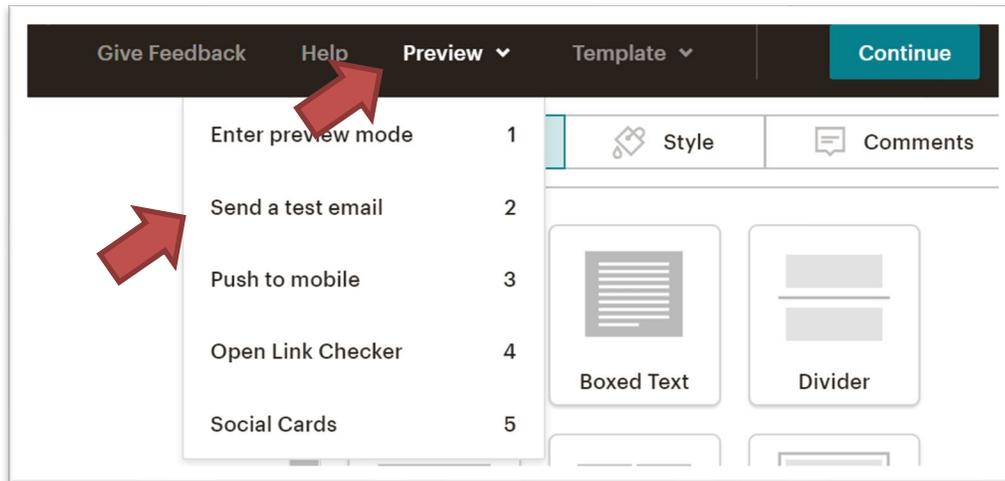
This screenshot shows the same 'Button' editing window, but with the 'Style' tab selected. A red arrow points to the 'Style' tab, indicating the user should click it to access styling options. The 'Content' tab is now dimmed. The 'Settings' tab is also visible. The 'Save & Close' button is still present at the bottom left.

## SENDING A TEST EMAIL

### Step 1: Preview your email

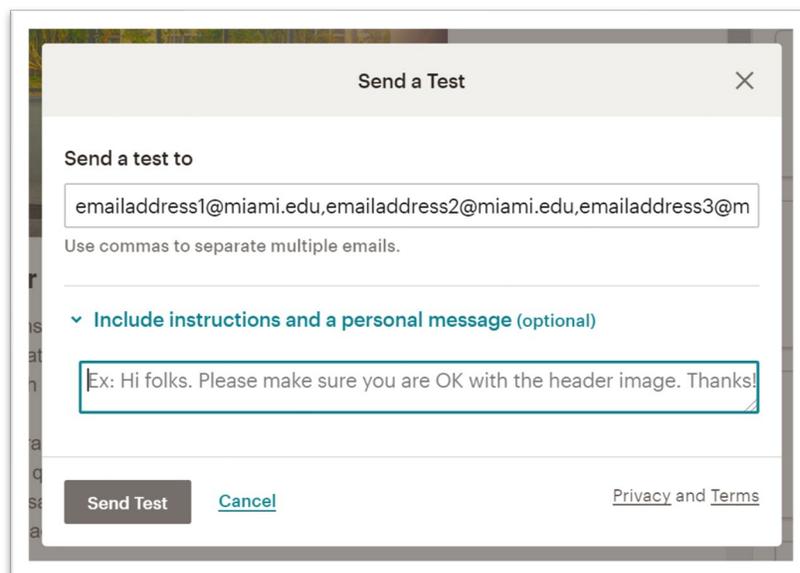
Sending a test email is considered a preview function. To access the test email function, select “Preview” from the master navigation along the top of your page.

From the “Preview” dropdown, select “Send a test email.”



### Step 2: Fill in your test list

The 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 'Canes Community inbox. If the email is ready and no revisions are needed, you can follow the listserv distribution steps (page 3) for the Regional Engagement liaison to review and distribute.

A screenshot of a 'Send a Test' dialog box. The title bar says 'Send a Test' with a close button. The main content area has a 'Send a test to' label above a text input field containing 'emailaddress1@miami.edu,emailaddress2@miami.edu,emailaddress3@m'. Below the input field is the text 'Use commas to separate multiple emails.' There is a checkbox labeled 'Include instructions and a personal message (optional)' which is checked. Below the checkbox is a text input field containing 'Ex: Hi folks. Please make sure you are OK with the header image. Thanks!'. At the bottom, there are 'Send Test' and 'Cancel' buttons, and a link for 'Privacy and Terms'.

## LOCALIST EVENTS

### OVERVIEW

Localist is the University's master calendar platform, providing a total view of what is happening at the University of Miami. 'Canes Communities are required to use this tool to promote events, as well as register and track event registration on behalf of their community. Localist is the primary registration platform for any UMAA affiliate group looking to host a simple and user-friendly registration format. The registration link generated by the Localist system will be used to update the button on the Mailchimp email templates, referenced in the *Updating a Button* section (page 16).

### 'CANES COMMUNITY LOCALIST REQUIREMENTS

All 'Canes Communities have their own Localist account. A minimum of two (2) 'Canes Community Executive Board members must master the tool to create event registrations. All board members have administrative access with a unique 'Canes Community login.

**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 LOCALIST TRAINING

Please refer to the ['Canes Community Localist Training Video](#) before reviewing the step-by-step [Localist User Guide](#).

### WEBSITE

<https://events.miami.edu>

### LOGIN INFORMATION

\*Provided in ['Canes Community Leadership Resource Guide Access and Password Tip Sheet](#)

## 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 [regionaleengagement@miami.edu](mailto:regionaleengagement@miami.edu).

## C.A.N.E.S. PROGRAMMING

Defined C.A.N.E.S. programming categories with event suggestions, including global programs offered to all communities and supported by the Office of Engagement, are found and detailed in the respective 'Canes Community Concept Paper, provided by your Regional Engagement Liaison.

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

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

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

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

**SUPPORT:** Programming that promotes a culture of philanthropy.

## 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 <i>(if applicable)</i>	\$200*	\$150*	\$100*

The University of Miami views 'Canes Communities volunteer leadership as an extension of the University; therefore, the following excerpts of the 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

To facilitate processing, we encourage grouping expenses into one reimbursement request at the end of the current fiscal year. All reimbursable expenses must meet the documentation requirements outlined in the next section.

REIMBURSABLE EXPENSES
A detailed restaurant receipt for UM branded 'Canes Community hosted events.
Miscellaneous event-related costs such as venue rental, musicians, 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 1 <sup>st</sup> in order to process before fiscal year-end.

NON-REIMBURSABLE EXPENSES
A bar receipt for non-UM events 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 **original itemized receipts** and an explanation of the business purpose for the expense detailing the date, place, UM branded 'Canes Community event name or activity, 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 must also 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 fiscal year 2023 budget and any financial requirement updates.*