

Expectations and Resources

	CAT 5	CAT 4	CAT 3
UM Dedicated Resources			
Market Data	Yes	Yes	No
Dedicated Staff Member	Yes	Yes	Partial
Regional Engagement Staff Visits	2-4	1-3	No
C.A.N.E.S. Credit (<i>if applicable</i>)	\$1,500	\$1,000	\$500
Office of Engagement Hosted Events	4 (2 per semester)	2 (1 per semester)	No
ListServ Access	Yes	Yes	Yes
Marketing Materials	Branded Programs and UM Hosted Events	Branded Programs and UM Hosted Events	Branded Programming Only
Electronic Registration	Yes	Yes	Yes
Metrics			
Engage constituencies annually	5,000	2,500	>50
Develop pipeline of major gift prospects	25	15	1-5
Achieve alumni participation (% of donors who give in their city)	10%	5%	2%
Leadership			
Officially Chartered	Yes	Yes	Yes
Alumni Council Member (President/President-Elect)	Yes	Yes	Yes
Participation in Joint UMAA Board and Council Meeting (President and President-Elect only)	Mandatory	Mandatory	No
Regular Local Executive Board Meeting	Yes	Yes	Yes

	CAT 5	CAT 4	CAT 3
1:1 UM Regional Team and President Meeting	Monthly	Monthly	Quarterly
Attend Annual Volunteer Leadership Summit (Communications Plan, Leadership Roles and Responsibilities, 'Canes Programming, etc.)	In-Person Half Day Training	In-Person Half Day Training	Computer Based Learning Video and Toolkit
Programming & Events			
C.A.N.E.S. Branded Programming Requirement	5	4	3
Host a Giving Day Reception	Mandatory	Mandatory	Suggested
Yearly Calendar of Events	Mandatory	Mandatory	Suggested
Marketing			
Social Media Accounts (Facebook Required; Regional Engagement Team admin. access)	Mandatory	Mandatory	Optional
Execute Co-Developed Communications Plan	Mandatory	Mandatory	Suggested
Reporting			
Post Event Attendance List	Yes	Yes	Yes
Post Event Follow-up and Survey	Yes	Yes	Suggested
Leadership Succession Plan	Yes	Yes	Yes