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Voting process ....................................................................................................................

Event and Alumni Chapter Annual Plan ............................................................................

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Chapter Leadership ............................................................................................................

President ..............................................................................................................................

Vice President .....................................................................................................................

Treasurer ..............................................................................................................................

Communications Chair .....................................................................................................

Events and Programs Chair (Appendix K & I) ....................................................................

Membership and Involvement Chair ...................................................................................

Building Your Volunteer Pipeline ....................................................................................... 

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Chapter Meetings ............................................................................................................... 

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Event Planning ....................................................................................................................

Scheduling Events ............................................................................................................... 

Variety of Events .................................................................................................................
Event Planning Timeline

Setting Dates

10-12 Weeks Prior to Event

8 Weeks Prior to Event

6 Weeks Prior to Event

4 Weeks, 2 Weeks and 4 Days Prior to Event

At the Event/Program

After the Event/Program

Event Sponsorship

Event Request Form (Appendix I)

Establishing the Registration Fee

Marketing & Communications

UCI Alumni Website and Email Broadcasts

Marketing Approach to an Event

Social Media

Chapter Logos and Designs

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B - Annual Charter Agreement

C - Leader Contact Information Form

D - Security and Use Statement

E - Chapter Bylaws

F - Guide to Reimbursements

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THE UCI ALUMNI ASSOCIATION

Our Mission

To enrich the lives of alumni and engage them in the lifelong advancement of UC Irvine.

About UCIAA

The UCI Alumni Association (UCIAA) is a nonprofit organization dedicated to connecting our alumni with each other and the university by presenting opportunities to network, be involved, support our students and serve as advocates for UC Irvine and the University of California. The UCI Alumni Association was established in 1968 and later separately incorporated in 1975 as a California nonprofit. The Association is governed by a board of directors comprised of 21 elected directors, four chapter representatives and five ex-officio members.

The Newkirk Alumni Center

The Newkirk Alumni Center is the home of the Association. Located near the corner of University Drive and Mesa Road, it serves as a gateway to the campus and features more than 12,500 square feet of space, including a conference room, den meeting room, outdoor patios, board room and office space to house the professional staff. The center is a hub of activity for returning alumni, parents, students and the community.
## Demographics

### Ethnicity

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<tr>
<th>Ethnicity</th>
<th>Percentage</th>
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<tr>
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<td>36.2%</td>
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<tr>
<td>Asian</td>
<td>24.9%</td>
</tr>
<tr>
<td>Latino, Mexican-American, Chicano</td>
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<tr>
<td>Vietnamese</td>
<td>4.8%</td>
</tr>
<tr>
<td>Filipino</td>
<td>4.4%</td>
</tr>
<tr>
<td>Pakistani, East Indian</td>
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<tr>
<td>Black, African-American</td>
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<tr>
<td>Native American</td>
<td>0.7%</td>
</tr>
<tr>
<td>Pacific Islander</td>
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<tr>
<td>Decline to State, Other</td>
<td>13.5%</td>
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</table>

*Includes projected Class of 2017 info. (approx. 8,000)

### Contact Information

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<td>Addressable</td>
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<td>E-mail addresses</td>
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</tr>
<tr>
<td>Phone numbers</td>
<td>117,693</td>
<td>64.4%</td>
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### Location

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<tr>
<td>So. California</td>
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<tr>
<td>LA, SD, OC counties</td>
<td>102,357</td>
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<tr>
<td>Orange County</td>
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### Average Age

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<th>Alumni</th>
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<td>70 yrs +</td>
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<tr>
<td>60-69 yrs</td>
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</tr>
<tr>
<td>50-59 yrs</td>
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<td>40-49 yrs</td>
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<tr>
<td>35-39 yrs</td>
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<td>8.8%</td>
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<tr>
<td>30-34 yrs</td>
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<td>26-29 yrs</td>
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<td>20-25 yrs</td>
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### School Alumni Numbers

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<th>Alumni</th>
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<th>UCIAA Paid Memb</th>
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<td>8,658</td>
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<td>4,631</td>
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<td>366</td>
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<td>371</td>
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<td>Public Health</td>
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<td>3,112</td>
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<td>48,480</td>
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<td>41,063</td>
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<td>Other</td>
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<td>117</td>
<td>96</td>
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<td>202</td>
<td>89</td>
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*Data as of June 30, 2017.*

Prepared by Blake Stone, UC Alumni Association, bstone@uci.edu
U.S. ANTEATER DEMOGRAPHICS

TOP 5 STATES:

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<thead>
<tr>
<th>State</th>
<th>Alumni</th>
<th>Paid Members</th>
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<tr>
<td>California</td>
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<td>6,543</td>
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<tr>
<td>Washington</td>
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<td>Texas</td>
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<td>New York</td>
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<tr>
<td>Oregon</td>
<td>1,572</td>
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Data as of June 30, 2017. Includes projected Class of 2017 info. (approx. 8,000)
UCI Alumni

CALIFORNIA STATE ANTEATER DEMOGRAPHICS

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<th>ALUMNI</th>
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<td>Amador</td>
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<tr>
<td>Butte</td>
<td>111</td>
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<td>Colusa</td>
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<td>Del Norte</td>
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<td>El Dorado</td>
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<tr>
<td>Fresno</td>
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<td>Glenn</td>
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<td>Humboldt</td>
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<td>Imperial</td>
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<td>Lassen</td>
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<table>
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<td>Madera</td>
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<td>Marin</td>
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<td>Mendocino</td>
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<td>Tehama</td>
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</tr>
<tr>
<td>Trinity</td>
<td>2</td>
</tr>
<tr>
<td>Tulare</td>
<td>270</td>
</tr>
<tr>
<td>Tuolumne</td>
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</tr>
<tr>
<td>Ventura</td>
<td>2,073</td>
</tr>
<tr>
<td>Yolo</td>
<td>324</td>
</tr>
</tbody>
</table>

Data as of June 30, 2017. *Includes projected Class of 2017 info. (approx. 8,000)

Prepared by Blake Stone, UCI Alumni Association, bstone@uci.edu
UCIAA MEMBERSHIP

UCI Alumni Association chapter leaders are expected to be active, paid members of UCIAA. You can feel good knowing that membership dues support all that we do, from recognizing the outstanding achievements of alumni, students, faculty, and staff through UCIAA's long standing Lauds & Laurels awards to bringing alumni back to campus for Homecoming. Save some money, have some fun, and stay connected all while supporting an association that represents you and Anteaters around the globe!

Top Benefits of Membership:

1. **Stay connected**: Find out the latest UC Irvine news, research and updates.
2. **Save money**: Get discounts on a wide variety of goods and services.
3. **Have fun**: Receive exclusive access to exciting events and programs.
4. **Show your pride**: It's just the right thing to do.

For more detailed information on membership, please visit: alumni.uci.edu/join

(See Appendix A for current membership rates)
<table>
<thead>
<tr>
<th>Membership Benefits</th>
<th>General</th>
<th>Annual</th>
<th>Lifetime</th>
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</thead>
<tbody>
<tr>
<td>Forwarding e-mail address</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Online Directory access</td>
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<td></td>
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<tr>
<td>Irvine Barclay Theatre &amp; Cheng Hall</td>
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<tr>
<td>Mercer Alumni Insurance Program</td>
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<tr>
<td>Access to affinity partner programs: credit card</td>
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<td>Kaplan Test Prep</td>
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<td>GBCO #AlumniDiscount</td>
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<td>Club Quarters</td>
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<td>Alumni Athletic Nights</td>
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<tr>
<td>VIP parking rates at Los Angeles International Airport</td>
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<td>FromYouFlowers.com (Use 25% off Code EFF8)</td>
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<tr>
<td>Total Women Gym &amp; Spa, Irvine Discount</td>
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<tr>
<td>Kiddle Pet Food Discount</td>
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<tr>
<td>UC Main Campus Library book borrowing privileges</td>
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<tr>
<td>Retail Discounts: Local Hospitality, Rental Cars (Avis &amp; Budget), Theme parks</td>
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<td>UC Extension Course Discounts</td>
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<td>Career Center Services Discounts</td>
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<td>Anteater Recreation Center Special Rate</td>
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<td>UCI Parking after 4 p.m. Discount</td>
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<td>UCI Athletic Summer Camp Special Rate</td>
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<tr>
<td>Tiered Pricing/Access to UCIAA Events</td>
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<td>Tiered Access to Select Events</td>
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<td>Exclusive University Event Invitations</td>
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<td>EBSCO Online Research Database</td>
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CLASSES OF MEMBERSHIP

There are six classes of membership in the Association: annual, life, paying life, associate, general and honorary. All UCI alumni are able to become members and participate in all chapter activities.

General Membership

A general member of the association shall be anyone who has been awarded a degree from the University of California, Irvine are eligible.

Annual Membership

An annual member of the association shall be anyone who has paid the annual dues for an annual membership and in addition meets one of the following requirements:

- Any person who has been awarded a degree of the University of California, Irvine
- Any person who currently serves or has served as a full-time employee of UCI on the faculty, administration, or staff
- Any person who has attended the University of California on any campus as a student for at least one quarter or as accumulated on any campus or in the University Extension 12 units of credit.

Life Membership

Anyone can become a life member in the association upon payment of a sum or sums set by the UCIAA Board of Directors, subject to change as it sees fit. Such sums, designated life membership dues, may be made paid in full, or in installments established at the time of initial payment. The dues for life memberships shall be placed, in whole or in part, in the life membership reserve fund, as the UCIAA Board of Directors in its discretion may determine.
Paying Life/Life Installment Members

Anyone is eligible to enroll in a paying life membership in the Association. Dues are paid via installment plan and when all payments are complete, the paying life member is deemed a full life member for all purposes.

Associate/Annual Membership

People who are not alumni of UC Irvine, but have demonstrated an interest in the Association or the University of California may enroll in an associate membership upon payment of dues established by the UCIAA Board of Directors, subject to change as it sees fit.

Honorary Life Membership

Any person who has rendered outstanding service to the University of California or to the UCI Alumni Association may become an honorary life member upon election to such by the vote or written assent of two-thirds of the members of the UCIAA Board of Directors.

VOTING RIGHTS

The voting power and privilege of holding office in this Association and its chapters shall vest exclusively in the UCI degreed alumni who are current members.

TERMINATION OF MEMBERSHIP

The membership and all rights of membership shall automatically terminate on the occurrence of any of the following causes:

1. The voluntary resignation of a member
2. The death of a member
3. By two-thirds vote of the UCIAA Board of Directors, in accordance to the process stated in the UCIAA Bylaws.
ROLE OF AN ALUMNI CHAPTER

WHAT IS A CHAPTER?
To meet the needs of an ever-expanding alumni population, an international network of dedicated alumni volunteers work hard to represent UCI Alumni in their local region, industry, affinity and academic communities.

UCI chapters play a vital role in the engagement efforts of UCIAA. They are an extension of the organization and are the connection at the local level. Chapters are critical partners in helping UCIAA achieve its mission to create a community of alumni that come to celebrate their alma mater and act as advocates for UC Irvine. Without chapters, UCIAA would not be able to engage so many alumni.

GOALS OF CHAPTERS
1. **Connect:** Provide UCI alumni with a lifelong connection to both fellow UCI graduates and to the University itself by expanding the boundaries of the UCIAA.

2. **Engage:** Provide diverse programming that represents the various interests and age groups of our diverse alumni through events and community service that foster the spirit of camaraderie and sentiment of alumni who reside in common region and/or share the same interests.

3. **Promote:** Encourage alumni to become members of the UCIAA, hiring of UCI students and alumni, along with supporting UCI traditions and initiatives.

4. **Serve:** Inspire and support current students by providing scholarship and mentoring support, feedback on projects, and the ability to serve on special committees as they arise.

BENEFITS OF BEING A RECOGNIZED CHAPTER
As a recognized chapter, the UCIAA staff will provide resources to promote your chapter’s success. As a chapter leader, chapters provide you with the opportunity to grow your leadership skills, network with fellow alumni, and support your alma mater’s goal of building lifelong UCI relationships around the world.
Specific chapter benefits include:

1. **Marketing**: Use of UCI branding, the ability to send approved emails and invitations to anyone listed in the UCIAA database, and access to branded social media accounts specific to the chapter and local audience.

2. **Event support**: Event planning support from UCIAA team, including financial and on-site assistance (when available), access to post on the UCIAA events calendar, and annual SWAG/giveaways.

3. **Chapter leaders**: All chapter leaders will be invited to attend an Annual Alumni Leadership Summit, which provides exclusive training and networking opportunities. Additionally, chapter leaders have the chance to be invited to exclusive events and will have access to trainings and other special opportunities throughout the year. A quarterly conference call is also hosted to better facilitate communication between chapter leaders and UCIAA staff.

4. **SWAG**: UCI Alumni branded merchandise will be provided in varying and sometimes limited quantities for your use in community and brand building with your alumni. SWAG varies from year to year and may be periodically picked up from campus or shipped out to regional chapters.

5. **Facilities**: The Newkirk Alumni Center, opened in 2012, is the home for UCI alumni on campus. It is equipped with meeting rooms, conference rooms and reception spaces of varying sizes. Chapters are encouraged to use the center for their activities and room rental fees are waived. Costs will be incurred for use outside of business hours (to cover house sitters). Costs may also be incurred for optional setup needs, catering, rentals and other vendor services. Please book the space through your chapter liaison as far in advance as possible, as space books up fast and is not guaranteed.

6. **Event inclusion**: UCIAA regularly hosts events in Southern California and throughout the world, where our alumni live. During event programs, UCIAA often invites chapter leaders to be recognized or share the platform to discuss their initiatives. UCIAA also periodically hosts events in major alumni markets outside of Southern California, including the SF Bay Area, New York, Washington, D.C., Chicago, China, Korea and more.
FORMATION OF CHAPTER OPERATIONS

EXPECTATIONS FOR CHAPTERS & VOLUNTEERS

Our most successful chapters are deeply committed to advancing the goals and programs of the UCIAA and the University. They not only enthusiastically support the institution, they also are committed to becoming involved with alumni programs and work to obtain the support and participation of others. This is generally accomplished through the following volunteer expectations:

Association Membership

The UCIAA’s annual operating budget is supported by membership dues. It is expected that members of a chapter and leadership committees will pay dues to the association throughout their tenure. It is also expected that chapter officers and committee members assist the association in growing its membership base by informing others about the importance and benefits of membership.

Committee Assignments

To effectively manage chapter operations and programming in a timely and organized manner, it is highly recommended that chapter leadership hold their respective positions or serve on at least one committee for a complete term (or minimally one year). Chapter leaders are expected to recruit qualified and enthusiastic individuals to support succession planning efforts. Chapter leaders should actively promote a variety of volunteer opportunities in order to mentor and develop potential chapter leaders.

Event and Meeting Attendance

It is important that members of the chapter leadership actively participate in the programs and events sponsored by both the chapter and the UCIAA. Chapter leadership should plan to attend the Annual Alumni Leadership Summit and send at least one representative to the UCIAA Annual Meeting and Dinner each calendar year.
Annual Chapter Charter Agreement

The Annual Chapter Charter Agreement outlines the expectations of chapter leaders, including the following:

1. Agreement to carry out the University and UCIAA mission and strategic direction
2. Preserve the brand of UCI, along with the use of appropriate communication tools
3. To submit the chapters quarterly minutes to your Chapter Liaison
4. Maintain the activity of the chapter’s communication and media outlets, such as the Facebook page
5. Assist in the transition of chapter leadership
6. Complete event recaps and submit the Annual Chapter Charter Agreement and Chapter Charter Registration Form (See Appendix B & G)

CONTINUED RECOGNITION

Fully chartered chapters shall be regarded as permanent chapters who are eligible for uninterrupted delivery of benefits and services outlined in this document until such time they choose to self-dissolve or are found to be out of compliance with chapter guidelines.

For full chapter organization chart, view Appendix H.
Alumni Chapters generally begin with a small group of dedicated alumni. A chapter can do many different things including serving as a social outlet for Anteaters and friends of UCI, creating pride and awareness in a community, raising funds for scholarships, and providing networking and professional development opportunities for alumni and current students.

Chapters can be formed in one of two ways:

1. A group of UCI alumni take the initiative
2. Based on density of alumni in a particular geographic or industry, the Alumni Association takes the initial steps to form a chapter and seeks out alumni volunteers

**STEPS TO BECOME A CHAPTER**

**Verification of Existing Chapter**

Contact the UCIAA to ensure that the Alumni Association chapter you wish to start does not already exist. If there is not a formal chapter, contact the to begin the process of creating one.

**Informational Meeting**

The UCIAA liaison assigned to your chapter will contact the alumni requesting the chapter to discuss the viability and responsibility of forming a new chapter. The Chapter Liaison will work with the volunteers to coordinate an informational meeting with all alumni that fit the targeted demographic. At this meeting, alumni can sign up to serve on committees and express interest in being a chapter leader.

**Voting Process**

Interested Alumni who are in good standing with the UCIAA can submit a short candidate profile to run for an officer’s position. A ballot will be emailed to the appropriate constituents to vote on the chapter’s leadership team.
Event and Alumni Chapter Annual Plan

With the leadership team in place, develop your plan for your first 6-12 months, to include at least two events, along with leadership meetings, communication schedule and other engagement activities you plan to start implementing.

Formal Approval and Recognition

Now that you have your team and an annual plan, you are ready to apply for formal recognition and chartering. The UCIAA board of directors meets quarterly and will consider your chapter application for review at the next board meeting.

CHAPTER LEADERSHIP

Chapters rely on great volunteers. A successful chapter needs a base of chapter leaders it can rely on to stay active and engaged. Active volunteers in the chapter keep the group current and energized and allow for the work to be divided amongst the chapter board. Volunteers are the lifeblood of the alumni association – it would not be possible without you! Below are job descriptions for alumni chapter leaders. Chapter leaders may absorb the responsibilities of other positions if serving a smaller chapter.

President (required)

1. Provide overall leadership and direction to the alumni chapter
2. In conjunction with the Chapter Liaison, establish chapter goals in support of the mission of the alumni association
3. Determine the chapter’s objectives for the year and work toward long-term goals
4. Supervise the coordination of the chapter’s activities
5. Attend chapter events and activities
6. Preside over chapter meetings
7. Honor the Annual Chapter Charter Agreement
8. Exercise overall financial responsibility for the chapter
9. Ensure the chapter operational guidelines are upheld, especially where it applies to financial accounting, revenue, payments and donations
10. Attend, or designate another chapter leader to attend, the Annual Alumni Leadership Summit, and report back to the chapter
11. Maintain contact with the Chapter Liaison

**Vice President/ President Elect (required)**

1. Preside over meetings in the absence of the president
2. Coordinate with the chapter president to advise all chapter leaders in the completion of tasks and responsibilities
3. Serve as interim president, if necessary, during a presidential transition
4. Assists with internal chapter communications/documents through use of shared google drive
5. Maintain chapter meeting minutes and distribute to chapter leaders and Chapter Liaison
6. With the president, oversee the succession planning process through a nomination committee who will then choose the slate of officers who will be elected for the following year/term
7. Maintain current roster of chapter leaders and submit updates to Chapter Liaison.

**Treasurer (required)**

1. Develop an annual budget and keep records of all financial transactions of the chapter
2. Collect and distribute chapter funds
3. Keep all invoices, receipts, etc. on file for at least two years; oversees chapter reimbursement requests
4. Work with event chair to keep track of event budget
5. Keep the rest of the board informed on the chapter’s financial status
6. Oversees a committee of volunteers who actively work to raise funds for scholarships
7. Submit a mid-year and year-end report on the chapter’s financials
Communications Chair (required)

1. Coordinates the community and marketing strategies for the chapter
2. Ensures a communication piece is sent to constituency at least once each quarter
3. Stays current with alumni association communication strategies and policies and ensures that the chapter adheres to UCIAA branding guidelines
4. Submits requests for broadcast emails to UCIAA staff in a timely manner. Last minute submissions are not accepted due to tight timeline of association operations.
5. Checks chapter email inbox; responds and delegates responses as needed
6. Oversees chapter social media outlets; maintains regular presences and coordinates with other volunteers regarding promotions for events and programs
7. Shares UCIAA messaging
8. Recruits and trains volunteers to support marketing and communications functions
9. Represents chapter professionally and ethically in all organizational activities

Events and Programs Chair (recommended)

1. Works with chapter leadership team to design programs which appeal to the alumni group’s diverse constituency and to plan the year’s calendar of events
2. Informs Chapter Liaison of plans and activities by submitting Chapter Annual Plan Worksheet and Event Request Form for coordination through the UCIAA office (Appendix K & I)
3. Coordinates with Communications Chair to insure proper lead time for communications to alumni promoting events and programs
4. Oversees the planning of programs and events, including all logistics, in accordance with the checklists (see Event Planning section) and other tools provided
5. Enlists the help of other alumni volunteers, including specific event chairs, to oversee and provide key support for individual programs
6. Surveys local recent alumni to determine their needs/interest, including specific topic ideas for future programming
7. Ensures that all events incorporate the mission and membership goals of the alumni association
8. Coordinates follow-up reports with staff and provides documentation for future reference
Membership and Involvement Chair (recommended)

1. Represents the chapter as the contact for alumni wanted to get involved with the chapter
2. Recruits and retains new participants by developing opportunities for volunteer engagement
3. Ensures that every chapter leader is current with their UCIAA membership
4. Promotes the value of UCIAA membership at events
5. Shares updates with Chapter Liaison

BUILDING YOUR VOLUNTEER PIPELINE

Securing volunteers for sub-committee service (short-term and longer term projects) will build your pipeline for volunteer leaders.

- Always be on the lookout for alumni who attend your events and programs and seek ways to involve new faces
- Keep track of volunteers; their contact information and special interests
- Promote teamwork so all volunteers feel supported
- Say thank you to volunteers personally
- Remember public thank yous at your event
- Send a handwritten note
- Share the efforts of your volunteers through a posting on the chapter’s social media platforms
CHAPTER OPERATING GUIDELINES

OFFICIAL REPRESENTATION

Chartered chapters and their members serve as representatives of both UCIAA and the University. This brings with it the responsibility of ensuring individuals and chapter programs present a positive and professional image of UCI. Chapters are expected to fulfill the purpose stated in their chapter bylaws. Chapter policies and procedures shall be consistent with UCIAA and University mission and values.

USE OF THE UNIVERSITY NAME AND OTHER ALUMNI NAMES AND MARKS

UCIAA is the official representative body of the alumni of UC Irvine. The names “Alumni Association,” “Chapter,” and other similar derivatives are for the exclusive use of this body. Only officially recognized chapters may use these terms. Chapters must follow the UCIAA Graphic Style Guide and policies pertaining to the use of said marks. (See Appendix L)

CHAPTER REPORTS AND ROSTERS

Chapters shall submit to the Chapter Liaison an official list of current officers and volunteers at the beginning of the fiscal year (July 1) or upon request from the UCIAA office or the UCI Alumni Association Board. Chapters are asked to complete a mid-year update which asks for updated information including an updated list of chapter leaders, summary of events held, and summary of plans for future events. If roster changes occur at other times, it is the responsibility of the chapter to update their Chapter Liaison. Official chapter contact information for use in publications and other communications will be drawn from these lists.

MEMBERSHIP DUES, BENEFITS AND SERVICES

Members of UCIAA receive a membership card and information listing general benefits and services afforded to all UCIAA members. The general benefits package and affiliated contracts or agreements are negotiated by the Office of UCIAA and approved by the Board of Directors as
applicable. Changes may occur at any time. Chapters may not collect additional membership dues above those collected by the Alumni Association; however, they may raise funds for scholarships and special projects with the complete awareness and advance approval of the Chapter Liaison.

**MINIMUM MEMBERSHIP FOR CHAPTER STATUS**

Chapters shall maintain a minimum number of five (5) active UCIAA dues paying members who serve as chapter leaders in order to remain chartered and receive benefits afforded to chapters. One of these leaders must be recognized as the official chapter president. If chapter membership drops below three (3) members for more than one (1) year, the chapter may face the possibility of losing official status.

**CHAPTER FINANCIAL ACCOUNTING AND REVENUE**

Formally chartered chapters are covered under UCIAA’s non-profit 501(c)(3) status. The chapters’ funds are managed and distributed by the UCIAA financial department. Chapters are expected to operate on a break-even basis. Chapters will keep an accounting of revenue and expenses for the year. All reports and documents will be sent to your Chapter Liaison at the midpoint and end of each fiscal year (January 1 and June 30) and reconciled with UCIAA financial department.

**CHAPTER FINANCIAL SUPPORT**

Stipends will be available by UCIAA to all recognized chapters every year on a fiscal year basis. The University’s fiscal year funds July 1-June 30. The funding is made available to recognized chapters in compliance with chapter bylaws and complete the tasks in the corresponding tiers.

Tier 1: $1,000

Tier 2: Tier 1 + $500

Tier 3: Tier 2 + $500
See Appendix J for details.

All funding requests need to be made through a direct request to the Chapter’s Liaison. Please remember that all chapter programs should operate as close to break-even as possible. All funding support is built to help chapters reach that goal. Unused stipend funding cannot roll over into the next fiscal year. Chapter funds generated through chapter fundraising or donations to the chapter will roll over to the next fiscal year.

**REIMBURSEMENT PROCEDURES**

It is important to note that reimbursements may take up to three to four weeks to complete once all required documentation is submitted.

A copy of your paid receipt with full itemized detail showing a zero balance (in some cases this is two different receipts) is required for all reimbursements. If an event involves reimbursement for food or drinks, you must provide a list of attendees. If you have an event and a vendor needs to be reimbursed, any payment from UCI requires that a vendor be set up in the system for payment, which can require a social security number or tax id. Alcohol must be on a separate receipt and cannot be drawn from UCIAA Funds. University policy has a meal maximum per person per event.

**MEAL MAXIMUMS PER PERSON**

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<th>Meal Type</th>
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<tr>
<td>Breakfast</td>
<td>$27</td>
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<tr>
<td>Lunch</td>
<td>$47</td>
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<tr>
<td>Dinner</td>
<td>$81</td>
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<tr>
<td>Light refreshment</td>
<td>$19</td>
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Current maximums come from UC Policy BUS-79 and were updated effective March 1, 2016.
Per-person meal expense is for an entire event and:

**Includes:**
Pre-meal items (e.g. beverages and hors d’oeuvres), meal, labor, sales tax, delivery charges, and other service fees.

**Doesn’t Include:**
Room rental and setup fees, media rental fees, decorations, and other non-meal expenses.

The host is required to provide receipts for departmental review. The receipts must identify both food and beverage charges.

Details on the reimbursement process can be found in Appendix F. Current reimbursement and meal rates can be found at:

**ACCEPTING PAYMENTS AND DONATIONS**

Event payments and general donations will be accepted through the UCI Alumni Association website and will incur any applicable credit card fees.

**FACILITIES AND RENTALS**

UCIAA can arrange for chapter meetings and functions to be held in campus facilities. If rental rates apply, chapters may use the alumni association’s discounted campus rate. This includes rental of audio-visual and other equipment.

**EVENTS AND ACTIVITIES**

Chapters are expected to plan events, hold meetings, and promote alumni association events and/or otherwise engage their constituency in the stated purpose of the chapter bylaws. The type of events or methods of engagement are at the discretion of the chapter. It is the
responsibility of the chapter to submit a calendar of events, meetings and activities if they want to insure such activities are promoted by the UCIAA. (See Appendix K)

CHAPTER MEETINGS

Chapter leadership must meet at least once a quarter. Meetings must be open to the chapter’s defined constituency and notes or minutes should be recorded and shared with the UCIAA office for record keeping purposes.

EVENT REPORTING REQUIREMENTS

Chapters shall submit event sign-in sheets to the Chapter Liaison within 72 hours of a chapter event or activity. Participants are recorded and participant information, such as email addresses, are updated within the University database to better assist chapters in maintaining contact with their constituents. Use of the alumni contact information must comply with the University Advancement Security and Use Statement and not for unauthorized purposes or for purposes outside of the scope of the mission of UCIAA. (See Appendix D)
EVENT PLANNING

SCHEDULING EVENTS

Group leadership is encouraged to meet in early summer to discuss plans for the upcoming year’s events. It is suggested to create an annual calendar that all members can reference. By planning events well in advance, groups can ensure enough time is allowed for:

- Adequate planning and marketing
- Food and venue reservation
- Preventing conflicts with holidays or local events
- Conflict with UCIAA events

When deciding on a date and time, be mindful of holidays (including religious holidays), local events and external factors like traffic. Try to pick a date/time that is convenient for the majority of the individuals you hope to attract to the event. Board members should attempt to attend all chapter events.

VARIETY OF EVENTS

Plan a diversified calendar of events that will appeal to a cross-section of your group’s alumni base. Consider establishing a signature event that anchors your alumni programming during the year and can become a tradition for alumni in your area.

Event Categories and Ideas:

- Gatherings featuring faculty or alumni speakers
- Networking events (include both professional and social)
- Young alumni events (networking and pub nights, etc.)
- Dinners with Anteaters*
- Theater or museum outings
- Community Service Project
- Summer Anteater Welcome Reception for local families entering UCI*
● Athletics game watch parties
● Behind the scenes tours
● Alumni Book Clubs
● Admissions Recruitment Receptions (international chapters only)*
● Family-oriented picnics
● Cooking classes
● Monthly luncheons (featuring alumni or faculty speakers)

*Contact Chapter Liaison for next steps

EVENT PLANNING TIMELINE

Setting the Dates

The ideal time to set dates for programs and events is at the beginning of the planning year (July). Even if your organization is not able to determine the exact date, at least establish the month for each program for planning purposes. Contact the Chapter Liaison for UCIAA events calendar to avoid conflicts when setting your dates.

10-12 Weeks Prior to Event

☐ Select date based on speaker, host and venue availability
☐ Your president or event/program chair, advise your Chapter Liaison of date and event
☐ Ensure date does not conflict with major University events
☐ Contact venue manager and develop budget based on catering and other event logistics
☐ Determine venue and/or catering payment policy and payment due dates
☐ Develop communications/marketing plan

8 Weeks Prior to Event

☐ Submit completed Event Request Form and forward to your Chapter Liaison
☐ Prepare content for communications and forward to Chapter Liaison
6 Weeks Prior to Event

☐ Your Chapter Liaison will coordinate e-communications, e-registration forms, website postings and links
☐ Once e-communications begin (5-6 weeks prior to event), promote program via social media and personal networks

4 Weeks, 2 Weeks and 4 Days Prior to Event

☐ Continue to promote program via social media and personal networks
☐ To increase responses, emphasize a different “value-added” or selling point in these follow-up email communications. Consult with your Chapter Liaison on ideas for market segmentation and communications

At the Event/Program

☐ Track all attendees as they arrive and record no-shows or those who “walk in” without prior registration
☐ Collect “walk-in” registration payment and reconcile in order to send to UCIAA as soon as possible
☐ Encourage attendees to get involved with your chapter and support scholarships if applicable
☐ Take photos for post event follow up (include candid and group photos)
☐ Consider broadcasting the event on the chapter’s social media
☐ Consider each chapter leader personally invite two new alumni to each event.

After the Event/Program

☐ Send photos taken with smartphones or tablets to your Chapter Liaison
☐ Provide Chapter Liaison verbal or written summary about event in order to share the recap with alumni who were not able to attend
☐ Send final list of attendees and no-shows to Chapter Liaison
For any personal reimbursements, please make sure to include the reimbursement form with your name, name with promotional information regarding the event, and the date of the event. Once received, reimbursements take approximately two weeks to process. You will be advised if the reimbursement will take longer than two weeks by your Chapter Liaison.

**EVENT SPONSORSHIP**

Chapters can seek sponsorships from local businesses, companies and/or individuals to help offset costs for a chapter event. Sponsors may provide door prizes, event supplies or a monetary gift. In return for providing gifts or services, they can receive gift-in-kind recognition from UCI. Sponsorships are great ways to further fund chapter events and support the University. Sponsors can be recognized through event marketing materials, as part of the event program and/or on social media pages. (Excluding alcohol sponsors)

**EVENT REQUEST FORM**

Chapters must submit an Event Request Form for all events. The form must be submitted at least six weeks prior to the event. (See Appendix I)

Once submitted, events will be:

- Advertised to your chapter via official emails, if requested
- Included on the UCIAA online events calendar
- Added to the chapter web page

Event Request Forms ask for all relevant event details, including:

- Date, time, location, description and category of event
- Registration details & fees
- The opportunity to request event supplies
- Contact information for the chapter event coordinator
ESTABLISHING THE REGISTRATION FEE

While chapters receive funding from the UCIAA, this annual allocation is to be used to support and supplement your overall engagement activities and programs for the fiscal year (July-June). This allocation can go a long way with effective planning.

If your program has costs associated with it, it’s necessary to assess a registration fee for alumni activities for two important reasons:

1. To help cover the cost of the activity
2. To add value to the activity. People are much more likely to be a “no show” at a free event than one they have paid a registration fee

There are many things to consider when establishing an event fee:

- Venue rental
- Food and beverage
- Service fee and gratuities
- Additional fees such as corkage fee or bartender fee
- Parking
- Décor
- Audio-visual
- Printing for programs or signage

Online Registration

UCIAA can build and maintain an online registration form for your chapter’s program. If your program does have a registration fee associated with it, the alumni association has an established, secure ecommerce account so that credit card payments can be made online. Once the online registration is closed for the event, the funds received are attributed to your chapter’s revenue account and are used to pay your organization’s program costs. Your staff liaison will keep you updated on the status of revenue received and expenses paid.
MARKETING & COMMUNICATIONS

UCI ALUMNI WEBSITE AND BROADCAST EMAIL

Chapters will have a presence on the UCIAA website to promote upcoming chapter events, event registrations, online credit card payment services and chapter information pages. UCIAA will send broadcast emails on behalf of the chapter. Chapters must provide UCIAA office with iModules Event Request Form at least six weeks prior to target send date. (See Appendix I)

UCIAA Marketing & Communications Team (MarCom)

The UCIAA marketing and communications team is responsible for distributing all electronic communication that aligns with the UCIAA’s strategic goals. These emails include information about university, Association initiatives, event marketing, membership opportunities, etc. The team is responsible for segmenting electronic communication to alumni and community supporters based on interest and focus demographics.

MarCom works closely with chapters to create and approve content for distribution. All design, verbiage and scheduling of broadcast emails is coordinated by the team unless otherwise discussed with the chapters. In order to accommodate multiple priorities and audiences, planning ahead is key to successful marketing. In 2016-17, UCIAA sent 318 emails with around 916 revisions. Providing clear direction and descriptive, complete information helps speed production. The more time given to the team, the more ability MarCom has to plan in order to provide additional support. Emails take an average 10 days to create due to extensive approval processes and design needs.
<table>
<thead>
<tr>
<th>Time Frame</th>
<th>Chapters Submit for Approval</th>
<th>What UCIAA Can Produce</th>
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<tbody>
<tr>
<td>≥ 3 months ahead</td>
<td>Event details: (all that apply) location, time, activities, logos, speaker bios, graphics (or graphic direction), photos for marketing, event description, required links, social media handles of persons or organizations partnered, invite list, etc.</td>
<td>• Event Invite #1</td>
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<td>• Event Invite #2</td>
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<td>• Reminder Email</td>
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<td>• Day of Survey Email</td>
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<td>• Thank you email</td>
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<td></td>
<td></td>
<td>• Social Media Post</td>
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<td></td>
<td>• Facebook Event</td>
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<tr>
<td>2 months ahead</td>
<td>Event details: (all that apply) location, time, activities, logos, speaker bios, graphics (or graphic direction), photos for marketing, event description, required links, social media handles of persons or organizations partnered, invite list, etc.</td>
<td>• Event Invite #1</td>
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<td>• Reminder Email</td>
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<td>• Facebook Event</td>
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<tr>
<td>1 month ahead</td>
<td>Event details: (all that apply) location, time, activities, logos, speaker bios, graphics (or graphic direction), photos for marketing, event description, required links, social media handles of persons or organizations partnered, invite list, etc.</td>
<td>• Event Invite #1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Reminder Email</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Social Media Post</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Facebook Event</td>
</tr>
<tr>
<td>3 weeks ahead</td>
<td>Event details: (all that apply) graphics (graphic direction), required hyperlinks, photos for marketing, social media handles of persons or organizations partnered, etc.</td>
<td>• Social Media Post</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Facebook Event</td>
</tr>
<tr>
<td>2 weeks</td>
<td>Event details: (all that apply) graphics (graphic direction), required hyperlinks, photos for marketing, social media handles of persons or organizations partnered, etc.</td>
<td>• Social Media Post</td>
</tr>
<tr>
<td>&lt; 1 week</td>
<td>Self marketing</td>
<td></td>
</tr>
</tbody>
</table>

*CHAPTER HANDBOOK 2018 VERSION 1*

#UCialumni
MARKETING APPROACH TO AN EVENT:

1. **Create a clear strategy/vision for the event** in collaboration with event lead.
2. **Develop and/or edit content** to market the event based on event details, audience, location, etc.
3. **Create a hero** (look and feel) **graphic/photo** to head the event and any supporting graphics necessary to execute the vision. Work with UCIAA on getting approvals for hero graphic, photo, etc.
4. **Prepare supporting graphic materials** (mostly digital, 50% print) for event. These include: website, event landing page, evite, social media (Facebook, Instagram, Twitter, LinkedIn, Snapchat), printed collateral if necessary (e.g. Homecoming, Lauds & Laurels, campus partnerships, regional events).
5. **Build out the website** – This includes event page (built by UCIAA), event form graphics, home page sliders and special messaging, event page graphics (banner).
6. **Create social media campaigns advertising event**. This includes post calendar, content development (say the same thing multiple times in an engaging and different way each time), find rich media, run live social media the day of the event and post event wrap-up.
7. **Design signage and event materials**. Define the needs of the event and inclusion materials, design distribution collateral, work with UCIAA for printing and mailing.
8. **Photography**. A majority of events do not include a professional photographer, and as such, rely on team photographers to capture the vibe. Afterwards, the team reviews, edits and posts photos on social media outlets. Professional photographers help in that they can shoot the event and edit photos for our immediate use.
9. **Emails**. Develop a strategy and assess when to launch emails based on already queued emails. Emails are drafted and copy is developed (often) or edited from supporting association leads. Emails are set up to run an A/B test, and successful ones are mass released to the alumni public. Event emails consist of the following sequence of messaging (initial launch email, additional follow-up emails to drive attendance, event details email to attendees, day of survey email and a thank you email w/ photos from event and additional action items).
SOCIAL MEDIA

Chapters should consistently maintain an active Facebook page or group that is active monthly at the minimum. UCIAA must create your Facebook chapter but once it exists, sole responsibility of its activity shall be driven by the chapter. Your Chapter Liaison and UCIAA must be an additional administrator. All login information for chapter social media outlets, such as Twitter and Instagram, should be shared with the UCIAA in the event leadership changes within the chapter. Chapters should only create social media accounts on platforms it believes it will be able to reasonably maintain. #UCIalumni should be tagged in all appropriate posts. Tagging the Association’s social media handles will increase awareness of posts but also provide the chapter the opportunity to be shared to the larger UCIAA audience in the case of a repost of share.

Facebook: facebook.com/uciaa
Twitter: twitter.com/uciaa
Instagram: Instagram.com/ucialumni
LinkedIn: https://www.linkedin.com/groups/28617

CHAPTER LOGOS AND DESIGNS

All chapters will receive a logo and a set of templates for event invitations and newsletters. Chapters shall not create alternative designs. The University’s trademark policy applies to all designed artwork for chapter promotions and merchandise. No alterations of the University marks or logos are allowed. Prior to production, artwork must be sent to the UCIAA for approval. All merchandise production is required to be done through a licensed approved vendor. UCIAA will work directly with vendors to print all merchandise.
HELPFUL WEBSITES

GENERAL UCIAA

Alumni Website – alumni.uci.edu

Alumni Online Community – engage.alumni.uci.edu

Membership – alumni.uci.edu/membership

Chapters – alumni.uci.edu/engage/chapters.php

Spirit Wall – alumni.uci.edu/give/spirit-wall.php

UCI RESOURCES

Main UCI Website – uci.edu

UCI News Site – news.uci.edu

Visit Campus (maps, tours, parking, etc.) – uci.edu/visit

University Facts – uci.edu/university-facts

UCI Strategic Plan – strategicplan.uci.edu

FINANCE


Reimbursement per person expense limits – accounting.uci.edu/travel/entertainment/meal-maximum
EVENTS

Campus Event Calendar – today.uci.edu
UCIAA Event Calendar – alumni.uci.edu/events

COMMUNICATIONS

UCI Strategic Communications & Public Affairs – communication.uci.edu

CAMPUS PARTNERS

Advancement – advancement.uci.edu
UCI Division of Continuing Education – ce.uci.edu
Athletics – ucirvinesports.com
Arts – arts.uci.edu
UCI Applied Innovation at The Cove – innovation.uci.edu
APPENDIX A – MEMBERSHIP RATES

Become a member of UCIAA and join more than 10,000 members who have already discovered the value of membership.

Take a look at our membership tiers and associated benefits, select the membership type that best describes you and your affiliation with UC Irvine from the choices below and complete the online membership application. It’s that easy.

**Alumna/Alumnus**

UC Irvine degree holders, or those who earned at least 12 credit hours from a degree-seeking program.

- $50 - Annual Membership
- $60 – Joint Annual Membership *(Both spouses/partners required to be UCI alumni.)*
- $500 – Lifetime Membership
- $550 – Lifetime Installment Option
- $700 – Joint Lifetime Membership

**Recent Graduate**

Graduates from the most recent two years are eligible for discounted membership rates.

- $30 – Annual Membership
- $400 – Lifetime Membership
- $450 – Lifetime Installment Option
Student

Current degree-seeking students at UCI are offered discounted membership rates.

$30 – Annual Membership

$400 – Lifetime Membership

$450 – Lifetime Installment Option

Faculty & Staff

Current employees of UCI are eligible for a discounted annual membership rate.

UC Irvine campus address required.

$30 – Annual Membership

$500 – Lifetime Membership

$550 – Lifetime Installment Option

UCI Division of Continuing Education (aka DCE formerly UCI Extension) & Friends (Associate Membership)

UCI Division of Continuing Education (DCE formerly UCI Extension) certificate holders/students, UCI Douglas Hospital residents/fellows and friends of UCI.

$55 – Annual Membership

$600 – Lifetime Membership

$650 – Lifetime Installment Option

*New lifetime membership installment options are available online.

**The lifetime membership installment option of annual payments over 4 years is no longer available. Those who are currently on this installment option may not make online payments and must mail their payment to: Newkirk Alumni Center, 450 Alumni Court, Attn: Membership, Irvine, CA 92697-1225
APPENDIX B – ANNUAL CHARTER AGREEMENT

ANNUAL CHARTER AGREEMENT
UCI ALUMNI ________________ CHAPTER

The UCI Alumni Chapter is a membership organization whose purpose is to be an independent voice that champions the University, and to organize alumni and friends into a formidable network to change the world. The vision is to be recognized as indispensable to the UCI family, connecting and engaging supporters with each other and The University. This is accomplished in local communities through the volunteer-led efforts of the UCI Alumni Chapters. To be eligible for official designation and support and services, Chapters must annually submit this charter agreement, along with the materials listed below, to the UCI Alumni Board of Directors. DEADLINE FOR SUBMITTING THE CHARTER AGREEMENT AND MATERIALS IS June 1.

The UCI Alumni Chapter named above hereby applies for charter approval and agrees to carry out the UCI Alumni mission in the following ways:

1. Be aligned with the UCI Alumni mission, purpose and vision, including active promotion of UCI Alumni membership and proper use of official UCI Alumni branding in all communication.
2. Provide programming for diverse interests and age groups and provide an event recap.
3. Use UCI Alumni resources for communication with UCI Alumni members and potential members who live in our chapter’s area; encourage alumni to keep their data current by updating their information on the UCI Alumni website and maintain chapter social media accounts.
4. Promote UCI Alumni membership among chapter members.
5. Adhere to the UCI Alumni bylaws as well as Chapter bylaws.
6. Proved chapter quarterly minutes to UCI Alumni Association.
7. Send all scholarship funds in a timely manner to the UCI Alumni Association office for management by the UCI Alumni Association finance department.
8. Complete the following documents with this Charter Agreement:
   o List of officers for the current charter year (minimal requirement: president, president-elect, treasurer, secretary and membership chair – all must be current UCI Alumni members in good standing)
   o Submit financial Status Report midyear and end of the year.
   o Chapter bylaws
9. By signing below, The UCI Alumni Charter pledges to assist the Chapter in its efforts to carry out The UCI Alumni mission in the ways set forth above.

As elected president of this chapter, I agree to the statements above.

______________________________  Charter Approved by UCI Alumni Board of Directors
Printed Name, President (Date): ______________________________

Signature ____________________________  Jeff Minhas, Executive Director

UCI Alumni __________________________ Chapter Date ______________________________

Signed Copy will be returned to Chapter President.
# UCI Alumni

## Alumni Chapter Leader Contact Information

<table>
<thead>
<tr>
<th>Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Name:</td>
</tr>
<tr>
<td>Chapter / Network:</td>
</tr>
<tr>
<td>Position:</td>
</tr>
<tr>
<td>If known, please provide your Advance ID and UCI Student ID:</td>
</tr>
<tr>
<td>Advance ID:</td>
</tr>
<tr>
<td>UCI Student ID:</td>
</tr>
<tr>
<td>Home address:</td>
</tr>
<tr>
<td>Can we send reimbursement checks to this address?</td>
</tr>
<tr>
<td>Can we ship items to this address?</td>
</tr>
<tr>
<td>If you answered no to either of these questions, please provide the preferred address:</td>
</tr>
<tr>
<td>Alternative address:</td>
</tr>
<tr>
<td>Please provide at least one of the following for contact with UCIAA staff:</td>
</tr>
<tr>
<td>Home phone:</td>
</tr>
<tr>
<td>Cell phone:</td>
</tr>
<tr>
<td>Business phone:</td>
</tr>
<tr>
<td>Email Address for contact with UCIAA staff:</td>
</tr>
<tr>
<td>Do you wish to provide a different email or forwarding from the Chapter email account?</td>
</tr>
<tr>
<td>If yes, enter here:</td>
</tr>
<tr>
<td>Please provide the following UCI information:</td>
</tr>
<tr>
<td>Class of:</td>
</tr>
<tr>
<td>Major(s):</td>
</tr>
<tr>
<td>Minor(s):</td>
</tr>
</tbody>
</table>

UCI Alumni Association  
Newkirk Alumni Center, 450 Alumni Court, University of California
University Advancement

Security and Use Statement

As a volunteer, I understand and agree that information received from University of California, Irvine’s Advancement database is confidential and the property of the Regents of the University of California. By receiving this information I agree to be bound by all applicable campus policies, system-wide policies, state and federal law which govern access to private, confidential, or proprietary information.

I understand that the University Advancement database and the data contained therein are the property of the Regents of the University of California, and are for official University Business only. No release of this information may be made to outside organizations or persons without written authorization. Immediately after using the list for the agreed-upon use, the User will destroy any and all copies of the file, including those in printed, electronic, or any other form. The user agrees not to duplicate, reuse, sell, trade or otherwise provide this information to any other party.

I am aware that the References and Related Policies on the reverse side outline University policies and State and Federal laws governing use of computer systems and disclosure of information. Violation of local, state, or federal statutes may carry the additional consequence of prosecution under the law, where judicial action may result in specified fines or imprisonment, or both, plus the costs of litigation or the payment of damages, or both.

Data Requestor Name: ___________________________ (Please Print)

Data Requestor Organization: ___________________________

Address: ___________________________ Phone: __________

Data Requestor Signature: ___________________________

Date: ___________________________

Purpose or Use of Data: ___________________________

________________________________________________

UCI Alumni Association
Newkirk Alumni Center, 450 Alumni Court, University of California
APPENDIX E – CHAPTER BYLAWS

____ (insert name)_____

Chapter

of the UC Irvine Alumni Association

Bylaws

ARTICLE I: ORGANIZATION NAME

This organization shall be known as the ____ (insert name)____ Chapter of the UC Irvine Alumni Association (UCIAA). This organization may also be referred to as ____ nickname ___.

ARTICLE II: MISSION STATEMENT - PURPOSE

The ____ insert name ______ Chapter is committed to fulfilling the following mission:

To enrich the lives of alumni and engage them in a lifelong advancement of UC Irvine.

ARTICLE III: MEMBERSHIP

A. Membership in the ____ insert name ______ Chapter is open to any UCI alumni interested in alumni activities at UC Irvine.

B. ____ insert name ______ Chapter members must be members in good standing in the UCIAA.

ARTICLE IV: DIRECTORS

A. The ____ insert name ______ Chapter shall have not less than four (4) directors but not more than seven (7) directors. They shall be collectively known as the Board of Directors.

B. All meetings of the Board of Directors shall also be deemed meetings of the members.
C. It shall be the duty of the Directors to be fiscally responsible for the organization and to provide sound leadership for the ___insert name____ Chapter in order to carry out its Mission Statement. To this end the Board of Directors shall develop a yearly business plan and set annual goals for the ___insert name____ Chapter.

D. Terms of Office:
1. Each of the directors will have a term of two years, and may not serve more than two consecutive terms in office in the same position without a one-year break in service.
2. If a director cannot fulfill his or her duties, the Board of Directors may appoint a member in good standing as an interim director until the next election.

ARTICLE V: CHAPTER OFFICERS

A. Executive Officers are members of the Board of Directors. In addition, these positions shall comprise the “Executive Board” of the ___insert name____ Chapter. If necessary, the Executive Board may serve concurrently as the Board of Directors.

1. President
2. Vice President/President Elect
3. Secretary/Treasurer (this position may be split into two)
4. Communications/Social Media Chair
5. The Chancellor, or designee, and the Executive Director of the UCIAA as the sponsoring department, or designee, are also ex officio voting members of this body.

B. The Executive Board shall have the authority to establish committees and appoint a chairperson for each committee. The chairs of these committees, if not already executive officers, shall be considered members of the Executive Board. (Refer to Article VI for committee descriptions.)

C. Terms of Office:
1. Each of the Executive Offices will have a term of two years.
2. The officers of the ___insert name____ Chapter shall not be allowed to serve more than two consecutive terms in the same office.
3. If an officer cannot fulfill his or her duties, the President shall appoint a member in good standing as an interim officer until the next election.

D. Duties of Officers:
President

1. Provide overall leadership and direction to the alumni chapter
2. In conjunction with the staff Chapter Liaison, establish chapter goals in support of the mission of the alumni association
3. Determine the chapter’s objectives for the year and work toward long-term goals
4. Supervise the coordination of the chapter’s activities
5. Attend chapter events and activities
6. Preside over chapter meetings
7. Honor the Annual Chapter Charter Agreement
8. Exercise overall financial responsibility for the chapter
9. Ensure the chapter operational guidelines are upheld, especially where it applies to financial accounting, revenue, payments and donations
10. Attend, or designate another chapter leader to attend, the Annual Alumni Leadership Summit, and report back to the chapter
11. Maintain contact with the Chapter Liaison

Vice President/President Elect

1. Preside over meetings in the absence of the president
2. Coordinate with the chapter president to advise all chapter leaders in the completion of tasks and responsibilities
3. Serve as interim president, if necessary, during a presidential transition
4. Assists with internal chapter communications/documents through use of shared google drive
5. Maintain chapter meeting minutes and distribute to chapter leaders and Chapter Liaison
6. With the president, oversee the succession planning process through a nomination committee who will then choose the slate of officers to be elected for the following year/term
7. Maintain current roster of chapter leaders and submit updates to chapter staff liaison.

Treasurer

1. Develop an annual budget and keep records of all financial transactions of the chapter
2. Collect and distribute chapter funds
3. Keep all invoices, receipts, etc. on file for at least two years; oversees chapter reimbursement requests
4. Work with event chair to keep track of event budget
5. Keep the rest of the board informed on the chapter’s financial status
6. Oversees a committee of volunteers who actively work to raise funds for scholarships
7. Submit a mid-year (Jan 1) and year-end (June 30) report on the chapter’s financials

Communications Chair

1. Coordinates the community and marketing strategies for the chapter
2. Ensures a communication piece is sent to constituency at least once each quarter
3. Stays current with alumni association communication strategies and policies and ensures that the chapter adheres to Alumni Association branding guidelines
4. Submits requests for broadcast emails to UCIAA staff in a timely manner. Last minute submissions are not accepted due to tight timeline of association operations.
5. Checks chapter email inbox; responds and delegates responses as needed
6. Oversees chapter social media outlets; maintains regular presences and coordinates with other volunteers regarding promotions for events and programs
7. Shares UCIAA messaging
8. Recruits and trains volunteers to support marketing and communications functions
9. Represents chapter professionally and ethically in all organizational activities

ARTICLE VI: COMMITTEES
In order to meet its goals and needs, the Executive Board may establish committees as necessary. Committees may be formed to support the operations and mission of the chapter and may include, but are not limited to Nominations, Programming, Communication, Scholarship, and Evaluation.

A. Membership on these committees, including those who shall serve as chairs, shall be appointed by the Executive Board. The Executive Board, at its discretion, may appoint an Executive Officer to chair a committee, or may appoint another member in good standing. All appointments shall be reported to the Board of Directors at its next meeting.

B. A Programming Committee would be charged with:
   1. Planning and implementing the yearly ____insert name____ Chapter calendar of events including the general meetings.
   2. Assisting the Vice-President with community and campus outreach planning and implementing the various outreach/community events of the ____insert name____ Chapter.

C. A Scholarship Committee would be charged with:
   1. Assisting the Treasurer with developing new resources for scholarships for UCI students and alumni.
   2. Coordinates with Chapter Liaison and assist with administering any scholarships maintained by the ____insert name____ Chapter.
D. An Evaluation Committee would be charged with:

1. Assisting the President in evaluating the effectiveness and value of the ____insert name ____ Chapter and recommending changes to the manner in which the ____insert name ____ Chapter operates.

2. Assessing whether the targeted goals and objectives of the business plan have been met.

ARTICLE VII: NOMINATIONS AND ELECTIONS

A. The Executive Board shall appoint, no later than April 1, a nominating committee of at least three chapter members who are in good standing for the purpose of developing and presenting a slate of recommended nominees for the positions available.

B. Board of Directors and officers shall be elected by a majority of the chapter membership present at the last meeting of the fiscal year in which elections are required.

ARTICLE VIII: MEETINGS

A. Meetings of the Executive Board shall be held at least quarterly.

B. There shall be two general membership meetings per year. An Annual General Meeting shall be held no later than June 25th, and shall be considered as one of the regular meetings. If necessary, elections shall be held during this Annual General Meeting. The other regular general meeting shall be held at the end or beginning of the calendar year and will be known as the Holiday General Meeting.

ARTICLE IX: PARLIAMENTARY PROCEDURE

A. The standing rules and regulations of the Board of Directors, Executive Board and the annual meeting shall be based on Robert’s Rules of Order.

B. In addition, the ____insert name ____ Chapter will comply with the Articles of Incorporation and the bylaws of the UCIAA, as well any decisions of the UCIAA Board of Directors. The UCIAA bylaws will serve as primary reference for resolution if questions, omissions, or conflicts arise within chapter bylaws.
ARTICLE X: FINANCES

A. A balanced budget must be presented at the ____insert name ____ Chapter Annual General Meeting and approved by a vote of two-thirds of the Executive Board.

B. The UCIAA shall be authorized to receive any information, records, or photocopies of transactions relating to the accounts as UCIAA may at any time request other records and documents of the organization.

C. If this organization should ever dissolve, any remaining assets held in its name shall be given to UCIAA within 60 days of dissolution for the direct use of the UCI Alumni Association.

ARTICLE XI: AMENDMENTS

The Executive Board, by the affirmative vote of at least two-thirds of those present, provided quorum exists, may amend these by-laws. All amendments must be approved by UCIAA.

END

Revised August, 2018
**APPENDIX F – GUIDE TO REIMBURSEMENT**

**IT IS ADVISED THAT REIMBURSEMENT REQUESTS BE SENT IN WITHIN 2 WEEKS OF THE EVENT**

**DOCUMENTATION REQUIRED WITH A REIMBURSEMENT REQUEST**

In order for the reimbursement to be processed smoothly, a few things are needed.

1. **Proof of the event. Examples are as follows:**
   a. Event Posting from UCIAA website or Facebook
   b. Flyer advertising the event
   c. Event Agenda

The above must include the name of the event, time, location and a description of the event.

2. **Attendee List**

This sign-in/check-in list should have:

- Attendees’ first and last name
- Name of the event and the date on top
- Numbers indicating the amount of attendees.

For example:

<table>
<thead>
<tr>
<th>NAME OF THE EVENT MM/DD/YYYY</th>
</tr>
</thead>
<tbody>
<tr>
<td>First</td>
</tr>
<tr>
<td>-------</td>
</tr>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>3</td>
</tr>
<tr>
<td>4</td>
</tr>
<tr>
<td>5</td>
</tr>
</tbody>
</table>
3. Proof of payment

Proof of payment includes:

a. An itemized **PAID** receipt from the place of business
b. A duplicate of the check written to pay the business
c. A screenshot of the credit card charge if a credit card was used.
d. In the case of a purchase made with cash, request a receipt noting “Paid in Cash” by the place of business.

Please rest assured that any personal information (credit card number, email, phone number, etc. will be redacted when submitted for approval).

**NOTE:** UNPAID INVOICE AND BLURRY RECEIPTS ARE NOT ACCEPTABLE.

**IMPORTANT:** If any reimbursements are for gifts (ie. Trophy, medals, gift cards, etc.). Please include a list of recipients.

4. Payee information required

a. Full Name
b. Mailing Address
c. Phone number
d. Email

5. Miscellaneous: *(for special cases)*

For gift reimbursements (see criteria above), the payee will have to be on-boarded to the university reimbursement system, Kuali Financial System (KFS). The onboarding process requires personal information including Social Security Number. Please rest assure that all of the information will be kept confidential and managed according to the university policy.

**NOTE:** Additional documents may be requested depending on the case. Your immediate response will help expedite your reimbursement.
The link below will direct you to the per person meal amount for each event, please keep this in mind when planning your event.


PROCEDURES AND EXPECTATIONS:

After ALL the appropriate documentation is obtained, the process of submitting the reimbursement to the UCI Accounting Department for approval begins. This process usually takes 2-3 weeks, due to the high volume of reimbursements coming from various campus departments. After the reimbursement is approved, it will take an additional week for the check to be mailed to the payee.

If for some reason the reimbursement is disapproved, KFS may require additional support documentation and the reimbursement process will start over again. Either way, please be assured that all appropriate expenses spent on behalf of the university will be reimbursed.

Attached is the blank Reimbursement Form, feel free to contact bugarini@uci.edu with any questions on how to fill it out.
## Alumni Relations
### Payment Request Form

**Payee/Vendor:**

**Purpose:**

**Expense Type:**

<table>
<thead>
<tr>
<th>Event/Meeting</th>
<th>Gifts</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Meeting/Programmatic Activities</td>
<td>Employee Recognition Gift (gift cards, gift certificates $75.00 maximum)</td>
<td>Event Supplies &amp; Materials</td>
</tr>
<tr>
<td>Employee Morale-Building Activities</td>
<td>Prizes (raffle prizes, door prizes, etc. $75.00 maximum)</td>
<td>Office Supplies</td>
</tr>
<tr>
<td>Recruitment</td>
<td>Flowers (bereavement, major illness, birth $75.00 maximum)</td>
<td>Membership/Subscriptions</td>
</tr>
<tr>
<td>Entertainment &amp; Prospective Donors</td>
<td>Non-Employee Gift ($200.00 maximum)</td>
<td>Registration Fees (not with Travel)</td>
</tr>
</tbody>
</table>

*Host Signature certifies that this is a true statement of entertain/ment/meeting expenses for official University business in accordance with the University Business 79 Policy on Entertainment.*

### Quickbooks:

<table>
<thead>
<tr>
<th>Invoice Date</th>
<th>Invoice #</th>
<th>Description</th>
<th>Amount</th>
<th>Account</th>
<th>Class</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

**Booked & submitted by (signature):**

**Date:**

**Approver’s Signature:**

**Date:**

### Fiscal Officer Only:

<table>
<thead>
<tr>
<th>KFS Doc#</th>
<th>Amount to Pay</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alumni Recharge (OS11832)</td>
<td>US Bank</td>
</tr>
<tr>
<td>General Funds (O12822)</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>Payee/Vendor</td>
</tr>
</tbody>
</table>

**Notes/Comments:**
APPENDIX G – CHAPTER CHARTER REGISTRATION FORM

UCI Alumni

UCI Alumni Association

Chapter Registration Form

I. Chapter NAME
Provide the full name of the chapter. This will be used on the UCIAA website and other marketing materials.

II. Chapter LEADERSHIP
Chapters are expected to have five leaders in place prior to requesting formal recognition.
Please list the chapter’s primary representative on the first line.

Name  Grad Yr  Preferred E-mail  Preferred Phone  UCIAA Member #

III. ACTIVITIES
Chapters are expected to organize at least two activities each year. Please provide details of at least two activities.

Activity Type  Proposed Date  Proposed Location

IV. AUTHORIZATION
The Chapter leaders must read and certify that:
1. The application & attachments are accurate and we will notify UCIAA of any change in information.
2. The organization will not discriminate based upon race, color, national origin, religion, gender, age, disability or sexual orientation.
3. We will comply with applicable UC and UCI Alumni Association policies as summarized in the Chapter Handbook and will inform other members of this organization of these regulations.

V. ADDITIONAL SUPPORT
Attach a list of UCI alumni who are willing to commit to involvement with the chapter.
Include Name, Grad Year, Preferred E-mail, Preferred Phone and UCIAA Member number.
Submit list and this application to: alumni@uci.edu
APPENDIX H – CHAPTER STRUCTURE

UCIAA BOARD

ALUMNI OFFICE

ACADEMIC CHAPTERS
- Division of Continuing Education (DCE)
- Education*
- Engineering Alumni Society (EAS)
- Humanities*
- Information & Computer Sciences (ICS)
- Masters in Urban Planning*
- Nursing*
- Paul Merage School of Business
- Public Health*
- School of Biological Sciences*
- School of Medicine*
- School of Nursing

AFFINITY CHAPTERS
- Black Alumni
- Campuswide Honors Program (CHP)
- Iranian American
- Korean American
- Latino
- Vietnamese American Community Ambassadors (VACA)
- Kababayan*

INDUSTRY CHAPTERS
- Anteaters in the Arts in:
  - Los Angeles
  - New York
- Anteaters in Law
- Anteaters in Philanthropy
- Anteaters in Marketing *
- Anteaters in Technology in:
  - Bay Area*
  - Los Angeles
- Anteaters 1811*

REGIONAL/INTERNATIONAL CHAPTERS
- Beijing, China
- Hong Kong, China
- London*
- Saigon, Vietnam
- Seoul, Korea
- Shanghai, China
- Shenzhen, China
- Texas*
- Portland*
- Chicago
- Los Angeles
- New York
- Orange County
- San Diego*
- San Francisco (Bay Area)
- Sacramento*
- Seattle*
- Washington, D.C.

*In progress
# APPENDIX I – IMODULES EVENT REQUEST FORM

## IMODULES EVENT REQUEST FORM

**THIS FORM IS DUE 6 WEEKS BEFORE DATE OF THE PLANNED EVENT.**

### EVENT SUMMARY

<table>
<thead>
<tr>
<th>NAME OF INDIVIDUAL REQUESTING EVENT SERVICES:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>CHAPTER POSITION:</td>
<td>EMAIL:</td>
</tr>
<tr>
<td>NAME OF EVENT:</td>
<td>DATE OF EVENT:</td>
</tr>
<tr>
<td>TIME:</td>
<td>LOCATION:</td>
</tr>
<tr>
<td>EVENT SPECIFICS:</td>
<td>TYPE OF EVENT:</td>
</tr>
</tbody>
</table>

### EVENT DETAILS

<table>
<thead>
<tr>
<th>NAME OF VENUE:</th>
</tr>
</thead>
<tbody>
<tr>
<td>VENUE ADDRESS:</td>
</tr>
<tr>
<td>IF THE VENUE HAS A WEBSITE, PROVIDE WEBSITE LINK:</td>
</tr>
<tr>
<td>COST PER TICKET:</td>
</tr>
<tr>
<td>CHILD PRICE (IF DIFFERENT):</td>
</tr>
<tr>
<td>CHILD AGES:</td>
</tr>
<tr>
<td>COST INCLUDES (BE SPECIFIC):</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WILL THERE BE ALCOHOL?</th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>PARKING ARRANGEMENTS MADE?</td>
<td>YES</td>
<td>NO</td>
</tr>
</tbody>
</table>

**IF YES TO PARKING ARRANGEMENTS, PLEASE SPECIFY DETAILS BELOW:**

**EVENT SCENARIO:**

Please attach an image/graphic for digital marketing efforts.

**UC Alumni Association**

Newkirk Alumni Center, 450 Alumni Court, University of California

#UCalumni
DONATION FIELDS

<table>
<thead>
<tr>
<th>SCHOLARSHIP ASK?</th>
<th>YES</th>
<th>NO</th>
<th>SPIRIT WALL ASK?</th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
</table>

OPTIONAL DIVERSION AMOUNT: ____________ OTHER: __________________________

ACCOUNT NAME: _______________________ ACCOUNT NUMBER: ________________

MARKETING MATERIALS

| TARGET AUDIENCE: | | |
|------------------|------------------|
| SPECIAL SPEAKERS? | ☐ YES | ☐ NO | IF YES, WHO? | ____________________________ |

LINK TO SPECIAL SPEAKERS’ BIOGRAPHIES: ____________________________

SPECIAL FEATURES OF EVENT/SELLING POINTS:

☐ YES  ☐ NO

DO YOU WANT AN EMAIL INVITATION SENT? ☐ YES  ☐ NO

DO YOU WANT REGISTRATION ON OUR WEBSITE? ☐ YES  ☐ NO

PLEASE PROVIDE A ONE PARAGRAPH EVENT DESCRIPTION/INVITATION WITH ANY SPECIFIC WORDING AND DETAILS:

* REQUESTED DATE FOR EVENT REGISTRATION TO GO LIVE (AT LEAST 3 WEEKS BEFORE EVENT): ______________________

* REQUESTED DATE FOR EMAIL INVITATION TO SEND (AT LEAST 3 WEEKS BEFORE EVENT): ______________________

ANYTHING ELSE WE SHOULD KNOW? (IE, RESTRICTIONS, DEADLINES, ETC.): __________________________

REQUESTED DATES ARE NOT GUARANTEED AND ARE SUBJECT TO UCIAA MARKETING/COMMUNICATIONS SCHEDULING.
APPENDIX J – ACTIVE CHAPTER FUNDING CHECKLIST

UCI Alumni
UCI Active Chapter Funding

Complete the following tasks within the fiscal year, which begins in July and ends in June, to receive UCIAA funding. All supporting documents should be submitted to the Chapter Coordinator.

**Tier 1 – Leadership and Administration**
All items in this tier are to be completed yearly in order to maintain an active chapter status and receive UCIAA administrative support and $1,000 stipend.

- [ ] All chapter officers are in good standing as alumni or life members of UCI Alumni Association
- [ ] Submit yearly roster of chapter leaders
- [ ] Submit annual plan and projected budget
  - [ ] Includes bylaws and mission statement
- [ ] Quarterly leadership meetings and submit minutes
- [ ] Create an online community profile (i.e. Facebook, Twitter or WeChat)
  - [ ] Online community profiles must be accurate and complete
- [ ] Board members represented at annual training
- [ ] Minimum of two events promoted to and open to all alumni in the area
- [ ] Minimum of one community service project

**Tier 2 – Engagement**
All items in this tier are to be completed in addition to Tier 1 requirements, to receive additional $500 stipend

- [ ] Increase number of members registered in online community by a minimum of 5%
- [ ] Minimum of an additional four events promoted to and open to all alumni in the area
- [ ] Minimum of one additional community service project
- [ ] Local, quarterly newsletter
- [ ] Welcome new alumnus (e.g. “In your neighborhood”)

**Tier 3 – Membership and Philanthropy**
All items in this tier are to be completed in addition to Tier 1 and Tier 2 requirements, in order to receive an additional $500 stipend.

- [ ] Increase number of alumni & friends with annual/life membership by 1%
- [ ] Increase the number of members registered in online community by an additional 5%
- [ ] Establish/maintain scholarship program for students

UCI Alumni Association
Newkirk Alumni Center, 450 Alumni Court, University of California

[UCI Alumni website]

#UCIalumni
APPENDIX K – CHAPTER ANNUAL PLAN

ALUMNI CHAPTER ANNUAL PLAN 2018-2019

Name:_________________________ Chapter Affiliation:_____________________

Instructions: Complete the following chapter annual plan and review with your Chapter Liaison.

Tier 1: Two events open to all alumni and 1 community service project

Tier 2: Four additional open events, 1 additional community service project, and quarterly newsletter

Tier 3: Establish scholarship program

<table>
<thead>
<tr>
<th>Quarter 1: July, August, September</th>
<th>Quarter 2: October, November, December</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Schedule quarterly leadership meetings and submit BOD Minutes</td>
<td>• Schedule quarterly leadership meetings and submit BOD Minutes</td>
</tr>
<tr>
<td>• August: Chapter Leadership Summit</td>
<td>• December: Holiday party</td>
</tr>
<tr>
<td>• ___________________________________</td>
<td>• ___________________________________</td>
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<tr>
<td>• ___________________________________</td>
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<td>• ___________________________________</td>
<td>• ___________________________________</td>
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<tr>
<td>• ___________________________________</td>
<td>• ___________________________________</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Quarter 3: January, February, March</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Schedule quarterly leadership meetings and submit BOD Minutes</td>
</tr>
<tr>
<td>• February: Homecoming</td>
</tr>
<tr>
<td>• ___________________________________</td>
</tr>
<tr>
<td>• ___________________________________</td>
</tr>
<tr>
<td>• ___________________________________</td>
</tr>
<tr>
<td>• ___________________________________</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Quarter 4: April, May, June</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Schedule quarterly leadership meetings and submit BOD Minutes</td>
</tr>
<tr>
<td>• April: Giving Day</td>
</tr>
<tr>
<td>• May: Lauds and Laurels</td>
</tr>
<tr>
<td>• June 26th: UCIAA Annual Meeting</td>
</tr>
<tr>
<td>• ___________________________________</td>
</tr>
<tr>
<td>• ___________________________________</td>
</tr>
<tr>
<td>• ___________________________________</td>
</tr>
<tr>
<td>• ___________________________________</td>
</tr>
</tbody>
</table>
### SUGGESTED EVENTS

<table>
<thead>
<tr>
<th>SOCIAL</th>
<th>VOLUNTEER (COMMUNITY SERVICE)</th>
<th>REGIONAL</th>
</tr>
</thead>
</table>
| • Attend John Lovitz (September 29, 2018)  
• Anti-Cancer Challenge on Campus (June 2019)  
• Pageant of the Masters (July 2019)  
• Attend Angels Game (July 2019)  
• New Swan Shakespeare reception (August 2019)  
• Plan your own Chapter social event | • Plan a Dinners with Anteaters (Any quarter Except Summer)  
• Volunteer for Sweatshirt Distribution (September 2018)  
• Volunteer at the Irvine Global Village festival (September 23rd, 2019)  
• Volunteer opportunity: Regional Yield Calls (March 2019)  
• [https://volunteer.uci.edu/](https://volunteer.uci.edu/) | • LA Cocktails & Conversations (October 11, 2018)  
• All UC Alumni Reception in DC with President Napolitano (November 27th, 2018)  
• San Jose/ San Francisco Reception and Basketball game (January 2019) |

### COMMUNITY SERVICE

<table>
<thead>
<tr>
<th>VOLUNTEER (COMMUNITY SERVICE)</th>
</tr>
</thead>
</table>
| • Plan a Dinners with Anteaters (Any quarter Except Summer)  
• Volunteer for Sweatshirt Distribution (September 2018)  
• Volunteer at the Irvine Global Village festival (September 23rd, 2019)  
• Volunteer opportunity: Regional Yield Calls (March 2019)  
• [https://volunteer.uci.edu/](https://volunteer.uci.edu/) |
UCI Alumni Association
UCI Alumni Relations Branding Strategy

Katherine Hills
Director of Communications
Office of the Associate Chancellor

o: 949.824.2761 • m: 949.697.9715

hillsk@uci.edu • www.uci.edu
Why

As UCI enters the second 50 years of its existence, the UCIAA brand is being evaluated and refreshed to ensure that it accurately represents the 170,000+ alumni and other audience constituents UCIAA serves.

UCIAA has – through natural evolution – assumed the role of trusted friend within the UCI family, and endeavors to fulfill that role to all audience segments. As the trusted friend, the UCIAA brand should be welcoming, positive and reassuring, respectful and respected, unassuming and accessible, and cool, but not aloof. The UCIAA brand should show strength of character and be a vibrant collaborator within the UCI family brand.

Most importantly, the UCIAA brand should evoke and incite the pride, spirit and intellect of UCI’s alumni, thereby eliciting the desire of all alumni to engage with UCI through UCIAA, and enthusiastically adopt and propagate the Anteater for Life ethos.
GOALS

• Support the strategic goals of UCI
• Support the strategic goals of UCIAA
• Introduce, reinforce and manage the UCIAA brand and culture
• Instill a sense of alumni pride for their UCI legacy
• Create the desire in all UCI alumni to engage with UCI through UCIAA
• Support specific UCIAA projects
• Align with organizational objectives
• Work within budget and resources
• Provide a consistent look and feel and voice to all UCIAA communications
• Create specific UCIAA brand guidelines within the UCI brand

AUDIENCE

• Approximately 170,000 degreed UCI alumni ranging in age from 20 to 72+
• Current UCI Students
• Non-degreed UCI alumni (having successfully completed at least one quarter at UCI)
• UCI Continuing Education (formerly known as Extension) Alumni
• Alumni Donors
• Non-Alumni Donors
• Sponsors and Partners
• Alumni Family and Friends
• UCI Advancement
• UCI Strategic Communications
• UCI Schools and Divisions
• UCI Faculty
• UCI Staff
• UC System
• City of Irvine
• Orange County Community (Local Community)
• State, U.S. and International Communities
• Media/Press
**MESSAGE**

UCIAA is your trusted friend. We are your home away from home. We’re your advocate, support network, social secretary, and perpetual cheerleader. We’re the bridge between your college self, your career self and your no-more-alarm clock self. We remind you of some of the best times in your life and help you create exciting new memories with old friends and new. We strive to improve your life through meaningful offers and unique opportunities - like VIP access to UCI’s expansive brain trust, world leaders, and alumni movers and shakers. Want to impact the world? We’re your partner that can make it happen - just tell us what you endeavor to achieve - and we’ll help you get there. We’re the friend you have a beer with, and the friend you seek out for sage advice. We’re the archiver of those of who have gone before us and those who will be Anteaters long after we are gone. We’re the protector of legend, the collector of stories, and the curator of accomplishments. We are proud of all and honor our best. We ensure that you always have a place where you belong - because you are an Anteater for life.

**UNIQUE VALUE PROPOSITION**

Connect and engage UCI alumni with UCI, each other, and their local and global communities through programs and opportunities that inspire pride, create an enthusiasm for more engagement, and ignite the desire in each alumnus to give of their time, talent and treasure.

**TAGLINE**

Anteaters Infinitum

**CALL TO ACTION**

Connect and engage with UCI and your fellow alums through UCIAA.
COMMUNICATING OUR MESSAGE

• Interesting Stories
• Compelling Narrative
• Enticing Opportunities
• Arresting Imagery

VOICE

Our voice is welcoming, familiar, knowledgeable, enthusiastic, encouraging, nurturing, empathetic, curious, interested, and genuine.

LOOK AND FEEL

Clean, contemporary, lots of white space, polished with professional typographic treatment, compelling photography, engaging stories.

Primary Palette (by priority):

- White
- UCI Blue; PMS 7685
- UCI Gold; PMS 109

Secondary Palette:

- Orange; PMS 715
- Dark Blue; PMS 654
- Sand; PMS 400
Whenever you use the logo, it should be surrounded with clear space to ensure its visibility and impact. No graphic elements of any kind should invade this zone.

**COLOR PALETTE**

- **UCI BLUE / PMS 7685**
  CMYK: 93/62/9/1
  RGB: 0/100/164
  HEX#: 0064A4

- **WHITE**

- **UCI GOLD / PMS 109**
  CMYK: 0/16/100/0
  RGB: 255/210/0
  HEX#: FFD200

- **BLACK**
A Message from Our Chancellor

This is an important time for UCI. We have achieved remarkable things in a mere 50 years, and we are positioned to achieve much more in the years and decades to come. This branding effort is an essential part of our continued success. It defines who we are, it delineates why we matter, and it clarifies what makes us different from other institutions of higher learning.

Our brand is a way of being. It isn’t simply a visual treatment, or a tagline or a logo that we individually apply to our materials. It isn’t a brochure or a TV ad. The UCI brand is the totality of what we present to the world. It is our essence. Our brand isn’t an invention we are introducing to the world. It is rather a revelation of who we really are today and who we aspire to be. Think of it as a promise that we make every time we communicate about the university.

Our brand matters because it defines how people think of us. Our brand matters because entities with strong brands – whether a private company or a public university – have time and again been proven more successful in the long run. Whether we’re talking to a prospective student, a parent, campus community, journalist, or donor, the promise we make through our branding determines how they feel about our school and their investment in our success.

The best universities all have superior branding. Now is the time for UCI to take its rightful place among the leading schools in the nation and the world by creating a school brand as unique and valuable as UCI itself. It’s time for our unique way of seeing things to come through. It’s time for us to Shine Brighter.

– UCI Chancellor, Howard Gillman, Ph.D.
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2. What is a Brand?

3. The UCI Brand
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   3.2 Brand Pillars
   3.3 How We Do It
   3.4 Mission

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   4.3 Color Variations for Core Elements
   4.4 Master Branding
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8. Answers
   8.1 Contact Information
Overview

The University of California, Irvine was founded with an exceptional group of faculty. They were profound, passionate innovators with a vision to bring world-renowned thinkers to a campus that would nurture courageous thought and life-changing research. They called upon a student body that didn’t fit predetermined molds – but who instead looked farther, investigated more, thought differently. Today, we carry the torch of this intention in everything we do and in everything we continue to create. The result is a reputation of unwavering excellence, worldwide recognition and an impressive community of diversified, continued support.

To the outside academic world, we’re recognized for commitment to innovation, which is evident in our world-renowned programs that have kept us among the most respected of the West Coast Universities, as well as a proven contender internationally. If our passion is to foster growth, to be a campus where even the word “innovation” gets redefined and continually challenged, then this golden path will continue for us for many years to come.
What is a Brand? 2.0
What is a Brand?

A brand is a promise we make to the world. A story of who we are and what we do, but also why we do it. We make this promise with every communication that we put out, whether it's an email, a press release, a web page, or a video. More importantly, each communication is part of a larger whole. What we convey as independent schools, departments, and entities shapes the perception of UCI in general. We each must honor this responsibility.

The goal of these brand guidelines is to help all of us make the same promise, tell the same story, and speak with the same voice. In this way, we can create a consistent story no matter how people hear from us.
### 2.1 Brand Platform

Our brand is built on a foundation consisting of these elements.

- **Core Idea:** Illuminating the Differences that Make a Difference.

- **Brand Pillars:** These pillars create the foundation our Core Idea is built upon. They are the values the university was founded on and influence every aspect of the brand today.

- **How We Do It:** The University’s role is to Activate Excellence: We translate the innovations of our faculty and students into insights, practices and products that help the world.

- **Mission:** The brand brought to life in an inspirational piece. This is what we believe in.
The UCI Brand 3.0

3.1 Core Idea
3.2 Brand Pillars
3.3 How We Do It
3.4 Mission
The UCI Brand

3.1 Core Idea*

Illuminating the Differences that Make a Difference.

Illuminating

› Make Brighter
› Advance to a higher intellectual level
› Highlight, promote or exalt discoveries

Differences

› New ways of thinking
› Imagination and creativity
› Confident in pioneering
› Breaking through traditional boundaries
› Open to new ideas; not copying our way to the top

Make a Difference

› Contribute
› Public Impact
› Provide innovative ideas that improve society

*The core idea is NOT a tag-line. A tag-line is an external, communicative line that powerfully expresses the value proposition inherent in the core idea.
3.2 Brand Pillars

These pillars create the foundation our Core Idea is built upon. They are the values the university was founded on and influence every aspect of the brand today.

- **Diversity**
  - We welcome those who not only come from different backgrounds, but show a diversity of thought as well.

- **Pioneering Spirit**
  - With respect to the past, we are constantly working towards a brighter future.

- **Real World Impact**
  - Our research and discoveries resonate well beyond the lab walls.

- **Optimism**
  - A positive attitude breeds positive results. Our faculty, staff and students collectively shine bright.

- **Audacity**
  - Daring minds challenge the status quo. They also choose an anteater for a mascot.

- **Community Involvement**
  - We believe we can learn as much from those in our community as much as we can give back.
3.3 How We Do It

The University's role is to Activate Excellence:
We translate the innovations of our faculty and students into insights, practices and products that help the world.

Example Stories

Free Wheelchair Mission
Seven engineering students, through the Samueli School's Engineering Design in Industry course, ensure that tires can stand up to the rigors of life in the developing world.

Unlocking stem cells’ potential to cure eye disease
Dr. Henry Klassen is discovering new ways to use stem cells to repair the retina, offering new hope for people suffering from retinitis pigmentosa and macular degeneration.

Focusing On Refugees
Student and Dalai Lama Scholar, Soraya Azzawi is dedicated to raising awareness of human rights struggles and the plight of refugees around the world.

UCI researchers create mosquitoes incapable of transmitting malaria
Anthony James and colleagues from UCI and the Pasteur Institute in Paris have produced a model that impairs the development of the malaria parasite.

Full Story >
https://www.eng.uci.edu/news/

Full Story >
http://news.uci.edu/features/

Full Story >
http://news.uci.edu/features/

Full Story >
3.4 Mission

At UCI, we believe in the infinitely curious. The tinkerers, the dreamers and the courageous of thought. We believe in the ones who are willing to fail, because they are the ones who dare to go where others won’t.

We believe in the innate and varied talents of people young and old, regardless of their background. For true progress is made when different perspectives come together to advance our understanding of the world around us.

Over 50 years ago, the university was founded on the belief that when you see things differently, when you see opportunity where others see impossibility, amazing things will happen. Barriers will be broken and life-enhancing discoveries will be unearthed.

That spirit thrives today, and our goal is simple, but profound. We generate knowledge and translate that knowledge into real world impact. We enrich the minds and inspire the spirits of tomorrow’s leaders. We enlighten our communities and point the way to a better future. And when each and every one of us has the courage to follow our convictions, together we can make a world of difference.
UCI Brand Identity System 4.0

4.1 Core Elements
4.2 Signature
4.3 Color Variations
4.4 Master Branding
4.5 Endorsement
4.6 Seal, Mascot & Monogram
4.7 Typography
4.8 Color Palette
4.9 Clear Zone
4.10 Restrictions
4.11 Support Graphic
4.12 Sample Applications
UCI Brand Identity System

4.1 Core Elements

These elements are the basis of our identity system. These are the only signature elements to be used to signify our University.

Since our brand lives in digital media (phones, tablets, PCs, URLs) – an environment navigated by buttons and with little visual real estate to spare – we must employ a clear and flexible system to maximize our brand awareness and recognition.

Master Brand – Primary Identifier

UC Irvine

Master Brand – Secondary Identifier: This version is used to mitigate instances where there is potential for confusion.

University of California, Irvine

Brand Endorsement: This version allows for flexibility and clarity when the hierarchy shifts away from the University. It creates a link between the University’s high-level brand promise and that which is being endorsed.
4.2 Signature

**MINIMUM SIZE**
Both versions of the UCI signature should not appear smaller than the minimum size (3/16” high) so that they are always recognizable and readable.

**MAXIMUM SIZE**
In all cases, the UCI signature should be treated tastefully and with integrity. It should never be scaled disproportionately large in relation to the piece in which it appears.
4.3 Color Variations for Core Elements

Master Brand – Primary Identifier

UCI

UC Irvine

Brand Endorsement

University of California, Irvine

University of California, Irvine
4.4 Master Branding

Master branding our Schools is smart business. By communicating a clear relationship to the University, each school can leverage the equity of the University brand. This in turn elevates the University's status by means of a clear association to each School’s offerings and achievements.

**School Signature**

<table>
<thead>
<tr>
<th>UCI</th>
<th>Name of School</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Primary ID</td>
</tr>
<tr>
<td></td>
<td>School Name</td>
</tr>
</tbody>
</table>

School Signature Configuration 1 – Preferred

<table>
<thead>
<tr>
<th>UCI</th>
<th>Name of School</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>UCI</td>
</tr>
<tr>
<td></td>
<td>Name of School</td>
</tr>
</tbody>
</table>

School Signature Configuration 2 – Centered

<table>
<thead>
<tr>
<th>UCI</th>
<th>Name of School</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>UCI</td>
</tr>
<tr>
<td></td>
<td>Name of School</td>
</tr>
<tr>
<td></td>
<td>Second Line If Needed</td>
</tr>
</tbody>
</table>

School Signature Configuration 3 – Flush Left, Stacked

<table>
<thead>
<tr>
<th>UCI</th>
<th>Name of School</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>UCI</td>
</tr>
<tr>
<td></td>
<td>Name of School</td>
</tr>
<tr>
<td></td>
<td>Second Line If Needed</td>
</tr>
</tbody>
</table>

School Signature Configuration 4 – Centered, Stacked
4.4 Master Branding

Named School Signature

UCI Named School Descriptor

Primary ID | Donor Name | School Descriptor

Donor Named School Signature Configuration 1 – Use when donor name recognition is LOW (e.g. international audience)

Donor Named School Signature Configuration 2 – Flush Left, Stacked
Use when donor name recognition is LOW (e.g. international audience)

Donor Named School Signature Configuration 3 – Centered, Stacked
Use when donor name recognition is LOW (e.g. international audience)

Donor Named School Signature Configuration 4 – Flush Left, Stacked
Use when donor name recognition is HIGH

Donor Named School Signature Configuration 5 – Centered, Stacked
Use when donor name recognition is HIGH

UCI Brand Identity System
4.4 Master Branding

**Academic Units**

- UCI Claire Trevor School of the Arts
- UCI Ayala School of Biological Sciences
- UCI Paul Merage School of Business
- UCI School of Education
- UCI Samueli School of Engineering
- UCI Division of Continuing Education
- UCI Graduate Division
- UCI School of Humanities
- UCI Donald Bren School of Information & Computer Sciences
- UCI Interdisciplinary Studies
- UCI School of Law
- UCI School of Medicine
- UCI Sue & Bill Gross School of Nursing
- UCI Pharmaceutical Sciences
- UCI School of Physical Sciences
- UCI Public Health
- UCI School of Social Ecology
- UCI School of Social Sciences
- UCI Division of Undergraduate Education
- UCI College of Health Sciences
4.4 Master Branding

While branding our departments is typically not necessary, here are a few acceptable constructs for presenting department names in conjunction with our identity.

**Academic Departments**

**UCI Department of Earth System Science**

Primary ID __________________________________________ Department Name

Department Only Signature

**UCI School of Humanities | Department of Philosophy**

School Signature __________________________________________ Department Name

Department + School Name

**UCI Samueli School of Engineering | Department of Biomedical Engineering**

School Signature __________________________________________ Department Name

Department + Donor School Name
4.4 Master Branding

Our centers of excellence are some of the best in the world. They're a critical part of the UCI story. As with our schools, the relationship of each center to the University must be made clear.

Our master branding system will ensure that both Center and University are strengthened by a direct and clear association.

University Centers

UCI

Sue & Bill Gross Stem Cell Research Center

<table>
<thead>
<tr>
<th>Primary ID</th>
<th>Center Name</th>
</tr>
</thead>
</table>

Signature Configuration 1 – Flush Left, Stacked

UCI

Sue & Bill Gross Stem Cell Research Center

<table>
<thead>
<tr>
<th>Primary ID</th>
<th>Center Name</th>
</tr>
</thead>
</table>

Signature Configuration 2 – Flush Left, Single Line
4.4 Master Branding Restrictions

**Signature Usage**
This page provides an example of incorrect and correct master branding. Our signature elements are intended to be used for signature purposes only (see fig. 2). All other usages are not acceptable (see fig. 1).

It is critical that we treat our signatures properly (by adhering to our system) and not denigrate our brand and the quality for which it stands.

**Signature Creation**
The following criteria must be met in order to warrant the need for a master branded signature:
- Falls under the category of a school, department or center of excellence
- Is a major University initiative directed by the Chancellor’s office

All other needs for a master brand signature are served by our existing identity system.

---

In the case of a themed communications (i.e., events), setting the “UCI” name in a promotional font is permitted. However, it is imperative that each promotion be clearly and properly endorsed by the University. To do this, we must apply the University signature with strict adherence to the system presented in these guidelines. The result will be a clear visual separation of the promotional event name from that of our University signature.

---

**Example: Web, Landing Page**

**FIG. 1**

When creating an event identity, do not embed the UCI signature

**FIG. 2**

Acceptable application of the UCI signature

Acceptable treatment of the UCI name
4.5 Endorsement

Our endorsement line is used when the communications priority is to create a link between the University’s higher-level brand and that which is being endorsed.

This allows the subject at hand to benefit from the quality assurance of the UCI brand. It also provides a greater degree of marketing flexibility when creating distinctive communications at the lower levels of the University.

Example

Contemporary Arts Center

University of California, Irvine

Primary Information

Endorsement
4.6 Seal, Mascot & Monogram

**Seal**

Our seal is primarily used to certify that a document is an official communication from the University.

For permission to use this seal please contact Strategic Communications at 949-824-6922

**Mascot**

*Peter The Anteater* helps to foster school spirit and offers a way to express UCI’s culture and individuality. Variations have been developed over UCI’s history. There is a selection of Anteaters at http://studentaffairs.uci.edu that may be used as design elements, or feel free to have fun and create your own.

**Monogram**

Our monogram is a rallying flag for athletic team support and school spirit.
4.7 Typography

**Primary Typeface**

Kievit Slab OT is the primary typeface for UCI’s communications. It has been chosen because its classic yet modern style reinforces the brand. It features a number of weights and thicknesses in standard and italic versions. This provides maximum flexibility for various applications.

To obtain Mac or PC versions of this typeface, contact Strategic Communications at 949-824-6922.

Kievit Slab is available [here](#) for purchase.

### Primary

- **Kievit Slab OT Thin**
  
  ```
  ABCDEFGHIJKLMNOPQRSTUVWXYZ
  abcdefghijklmnopqrstuvwxyz
  12345678901234567890!@#$%^&*()
  ```

- **Kievit Slab OT Extra light**
  
  ```
  ABCDEFGHIJKLMNOPQRSTUVWXYZ
  abcdefghijklmnopqrstuvwxyz
  12345678901234567890!@#$%^&*()
  ```

- **Kievit Slab OT Light**
  
  ```
  ABCDEFGHIJKLMNOPQRSTUVWXYZ
  abcdefghijklmnopqrstuvwxyz
  12345678901234567890!@#$%^&*()
  ```

- **Kievit Slab OT Regular**
  
  ```
  ABCDEFGHIJKLMNOPQRSTUVWXYZ
  abcdefghijklmnopqrstuvwxyz
  12345678901234567890!@#$%^&*()
  ```

- **Kievit Slab OT Book**
  
  ```
  ABCDEFGHIJKLMNOPQRSTUVWXYZ
  abcdefghijklmnopqrstuvwxyz
  12345678901234567890!@#$%^&*()
  ```

- **Kievit Slab OT Medium**
  
  ```
  ABCDEFGHIJKLMNOPQRSTUVWXYZ
  abcdefghijklmnopqrstuvwxyz
  12345678901234567890!@#$%^&*()
  ```

- **Kievit Slab OT Bold**
  
  ```
  ABCDEFGHIJKLMNOPQRSTUVWXYZ
  abcdefghijklmnopqrstuvwxyz
  12345678901234567890!@#$%^&*()
  ```

- **Kievit Slab OT Extrabold**
  
  ```
  ABCDEFGHIJKLMNOPQRSTUVWXYZ
  abcdefghijklmnopqrstuvwxyz
  12345678901234567890!@#$%^&*()
  ```

- **Kievit Slab OT Black**
  
  ```
  ABCDEFGHIJKLMNOPQRSTUVWXYZ
  abcdefghijklmnopqrstuvwxyz
  12345678901234567890!@#$%^&*()
  ```
4.7 Typography

**Secondary Typefaces**

Helvetica, Arial and Verdana are system fonts that may be used in combination with Kievit Slab OT for any digital or print communications. These fonts are most appropriate for technical information, call-outs, footnotes and other tertiary information.

### Secondary

**Helvetica Light**

```
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890!@#$%^&*()
```

**Helvetica Regular**

```
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890!@#$%^&*()
```

**Helvetica Bold**

```
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890!@#$%^&*()
```

**Arial Regular**

```
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890!@#$%^&*()
```

**Arial Bold**

```
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890!@#$%^&*()
```

**Verdana Regular**

```
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890!@#$%^&*()
```

**Verdana Bold**

```
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890!@#$%^&*()
```
4.8 Color Palette

**PRIMARY COLOR PALETTE**

Our primary color palette consists of two colors plus black and white and should be used on all design and marketing materials, both internally and externally.

**SECONDARY COLOR PALETTE**

Colors from the secondary color palette may be used as complements to the primary palette.

---

### Primary

<table>
<thead>
<tr>
<th>Color</th>
<th>CMYK</th>
<th>RGB</th>
<th>HEX#</th>
</tr>
</thead>
<tbody>
<tr>
<td>UCI BLUE / PMS 7685</td>
<td>93/62/9/1</td>
<td>0/100/164</td>
<td>0064A4</td>
</tr>
<tr>
<td>UCI GOLD / PMS 109</td>
<td>0/16/100/0</td>
<td>255/210/0</td>
<td>FFD200</td>
</tr>
</tbody>
</table>

### Secondary

<table>
<thead>
<tr>
<th>Color</th>
<th>CMYK</th>
<th>RGB</th>
<th>HEX#</th>
</tr>
</thead>
<tbody>
<tr>
<td>PMS 549</td>
<td>60/24/21/0</td>
<td>106/162/184</td>
<td>6AA2B8</td>
</tr>
<tr>
<td>PMS 400</td>
<td>23/21/26/0</td>
<td>197/190/181</td>
<td>6EBEB5</td>
</tr>
<tr>
<td>PMS 654</td>
<td>100/84/31/17</td>
<td>27/61/109</td>
<td>1B3D6D</td>
</tr>
<tr>
<td>PMS 715</td>
<td>0/54/93/0</td>
<td>247/141/45</td>
<td>F78D2D</td>
</tr>
<tr>
<td>PMS 425</td>
<td>65/56/53/29</td>
<td>85/87/89</td>
<td>555759</td>
</tr>
<tr>
<td>PMS 100</td>
<td>5/1/76/0</td>
<td>247/235/95</td>
<td>F7EB5F</td>
</tr>
</tbody>
</table>

---

**CMYK** (Cyan Magenta, Yellow, Black) – also referred to as "process colors," the method by which images are printed using cyan, magenta, yellow and black. The specific numeric values refer to the percentages of each of the four process colors.

**Pantone®** – the proprietary color matching system used in printing to create inks and maintain color integrity; the PMS numbers refer to the Pantone® Matching System.

**RGB** (Red, Green, Blue) – the method by which video monitors and projectors display color; the numeric values listed in to the amount or intensity of red, green and blue in each of the colors.

**PANTONE® is a registered trademark of Pantone, Inc.** The colors shown here are not intended to match the PANTONE® Color Standard. See current edition of the PANTONE® Color Formula Guide for accurate color standards.
4.9 Clear Zone

On both signature configurations, always maintain a clear zone around the signature to maximize recognition and maintain integrity. These areas should never be intruded upon by any other element. This is a measurement that is equal to the width of the “U” in the Primary Identifier.
### 4.10 Restrictions

**UNACCEPTABLE USAGE**

This page provides some examples of incorrect usage. The Signature, color palette and typeface are the primary elements of the brand identity. To maximize the opportunity for visual recall, they must be applied consistently as specified in these guidelines.

- Only use colors as specified in this document.
- Do not skew or distort the Signature. Only scale artwork proportionately.
- Do not alter the Signature with a different typeface.
- Do not enclose the Signature in a tight shape.
- Do not create a Signature using more than one color.
- Do not place the Signature on a background that may compromise legibility.
- Do not alter the relationship of the Signature elements.
- Do not outline the Signature.
- Do not rotate or change the orientation of the Signature elements.
- Do not place a light colored Signature on a white background.
- Do not alter the configuration of the Signature.
- Do not add design elements to the Signature.
4.11 Support Graphic

**Bright Mark**
Our Bright Mark is a support graphic that helps us to express our brand. As an abstract mark, it has no single meaning, but instead supports many ideas around education – illuminating knowledge, a bright idea, a brilliant performance or a shining example. It’s mathematical in nature and connotes science, energy and beauty.

The **12-pointed version** is used for smaller or quieter applications.

The **16-pointed version** is used for larger or more dynamic applications.
4.11
Support Graphic: Application

As shown in figures 1 & 2, our Bright Mark may be applied at any scale and cropped in any manner that best supports your overall design and layout. You may also apply it – in its entirety – as shown in figure 3.

The following section, 4.12, shows sample applications that demonstrate the various ways in which the Bright Mark can be applied.
4.11 Support Graphic: Restrictions

**UNACCEPTABLE USAGE**

This page provides some examples of incorrect usage of the Bright Mark.

In order for our Bright Mark to be bright, we must ensure that the substrate and/or background color on which it is placed, be darker than that of the mark itself.

There should be adequate contrast between the Bright Mark and the background.

Do not create patterns using the Bright Mark.

Do not use the Bright Mark at a size smaller than 1/2 inch.
4.12 Sample Print Applications
4.12 Sample Print Applications
4.12 Sample Digital Applications
4.12 Sample Retail Applications
Tone of Voice 5.0

5.1 Guiding Principles
5.2 Key Messaging
5.3 General Rules
What is Tone of Voice?

Just as our design uses a distinctive look and feel that sets our brand apart, the words we use – the copy we create, the story we tell – must be distinctly our own. Capturing the unique UCI voice is critical to the success of every communication. Creating consistency in tone across every written or spoken communication is an important responsibility that rests with each of us. We speak for UCI.
5.1 Guiding Principles

Make It Accessible
While UCI is home to many kinds of specialized knowledge, each with its own distinctive vocabulary, in our general communications we should speak in an articulate way that is accessible to a general audience. Avoid jargon or technical language. Steer clear of over-used buzzwords. Aim to sound intelligent, but never stuffy or pretentious. Most importantly, keep your audience in mind and always craft your language to connect with them and foster understanding.

Keep It Conversational
While you may aim for an academic writing style in professional publications, when we write for a general audience, a conversational tone is key. Keep sentences short. Don’t use more words than is necessary. Keep the tone active, not passive. Ask yourself, “Would this sound natural if I said it in conversation?” If not, simplify what you have to say.

Be Inspiring
A sense of optimism is central to our brand. The ingenuity and pioneering spirit that we embody should inform every communication. Underlying everything we say is a simple message: anything that we can envision and imagine, we can accomplish.

Try to Tell a Story
It’s almost always easier to relate to a narrative of some kind, as opposed to an abstract idea. So where possible, show, don’t tell. Be specific and concrete. Bring a person, team, department, or unit to life by sharing their achievement. Give specifics, add details for color, and try to paint a meaningful picture that people can relate to.

Illustrate our impact
Our brand is all about “Illuminating the differences that make a difference.” There are a multitude of ways to do this – through a story, a quote, a fact, an allusion. Our goal is to engage our viewers and readers in moments that surprise them with something they didn’t expect – a new way of seeing the world.
Where you see an egg, we see a cure for cancer.

Making a difference starts with understanding the power of different. A different perspective, a different approach, a different way of thinking.

At the University of California, Irvine, our breakthrough research and broad resources are leading innovations of every scale and making a difference in every corner of the world.

Chemists at UCI have found a way to unboil an egg, returning unstructured proteins to their original liquid state. This discovery simplifies protein folding, a key step in therapeutic treatments for cancer.

Find out what's possible with UCI

Visit www.uci.edu/innovation

University of California, Irvine
Shine brighter.

Accessible language in the headline draws in the reader.

Conversational tone builds connection.

Inspirational, big picture tone sets brand context for the story.

By telling the story of this breakthrough in easy-to-understand language, we convey our commitment to real-world impact.
5.1 Guiding Principles: Examples

Brand Ad Campaign

Where you see an egg, we see a cure for cancer.

Where you see a squid, we see a medical device communicating with the human body.

Where you see a campus, we see a 50-year legacy of sustainability.

Where you see a drought, we see a policy for change.
5.2 Key Messaging

<table>
<thead>
<tr>
<th>AUDIENCE</th>
<th>KEY POINTS/TAKE-AWAYS</th>
<th>MESSAGE</th>
</tr>
</thead>
</table>
| Students | • Gateway to the world<br>• Nurturing your unique strengths<br>• Free to be me | • We take you beyond the classroom and into the world. Our faculty are the most accomplished innovators who believe in activating your ideas toward real world impact. Here, the brightest and the most passionate are making their distinctive mark through UCI.  
  • We enthusiastically embrace the bold, the one-of-a-kind, the independent mind. Those who see things differently. Who know differently. Who do differently. Those with the ability to shine brighter. |
| Faculty  | • Forge your own path to real-world impact<br>• Global preeminence (not a regional school) | • We not only know how innovation happens but more importantly, who makes it happen. Here we embrace the difference-makers that make a real difference. Whether [discovering the harmful effects of CFCs on the ozone layer or being recognized for breakthrough Alzheimer’s research or catapulting California’s only new law school to national standing], each of these accomplishments started with unique contributions of intellect, imagination and creativity. Those with the resolve and courage to pursue a new idea. Through UCI it was made real. |
| Alumni   | • Proud to be an Anteater<br>• I’m a better me because of my time at UCI | • You’re a part of a group of individuals that didn’t fit predetermined molds – but who instead looked farther, investigated more, thought differently. Today, we carry the torch of this intention in everything we do and in everything we continue to create. The result has been a 50-year reputation of unwavering excellence, worldwide recognition and an impressive community of diversified, continued support. As alumni together, we continue to make a difference through our UCI ties. |
### 5.2 Key Messaging

<table>
<thead>
<tr>
<th>AUDIENCE</th>
<th>KEY POINTS / TAKE-AWAYS</th>
<th>MESSAGE</th>
</tr>
</thead>
</table>
| **Donors** | • Legacy and impact  
• Global preeminence (not a regional school) | • Those of us in the world who aim higher, who are selective in our contributions, who seek to support pioneering work in a lasting, sustainable way, aren’t persuaded only by innovative ideas; there must be action, and ultimately, impact. We are proud that our award-winning faculty and highly engaged student body give donors an opportunity to be participants in such important work. Those who give here know their support and legacy won’t just shine for today, but will continue to grow, to shine brighter, for generations to come. |
| **Community** | • Global preeminence (not a regional school)  
• Creating impact locally and globally  
• UCI makes my community better | • We are proud to be a globally preeminent University located in the heart of Orange County. As the second largest employer, and the provider of world-class health care to our community, we are deeply invested in and connected to the people who help us shine brighter. We are the Anteaters. We are the difference-makers – making a difference here at home and around the world. |
5.3 General Rules

First, Second and Subsequent References: “UCI” is preferred in all textual references to the university, though “University of California, Irvine” may be suitable for certain target audiences. For unfamiliar – particularly regional, national and international – audiences, use the university’s full name for added clarity; for campus and other familiar audiences, use “UCI” in the first reference.

Headlines and Headings: Headlines and headings in correspondences, publications, websites, etc., are often subject to spacing constraints and, thus, require significant flexibility in their application. Therefore, it is acceptable to use “UCI” in headlines and headings. Other words, such as “campus” or “university,” may be appropriate to avoid redundancy.

Titles and Names: Since the family of “UCI”, “UC Irvine” and “University of California, Irvine” wordmarks are preferred in most graphical applications, and since “UCI” is the preferred first textual reference to the university, the names of titles and/or programs should follow suit. Whenever possible, UCI Medical Center and UCI Foundation are two examples of recently updated references. For reasons of continuity or familiarity, “UCI” is allowable in such applications.

Text vs. Graphics: The family of “UCI” and “UC Irvine” wordmarks should only be used as graphic elements (as provided in official artwork available on the campus’s Graphic Identity Standards Web site), and should not be replicated in textual forms. In text, “UC Irvine,” with a space between “UC” and “Irvine,” is correct.
5.3 General Rules

Common Uses

**UCI:** The preferred textual reference to the university, particularly when addressing familiar or internal audiences.

**University of California, Irvine:** Preferred as a first reference for non-local or unfamiliar audiences.

**UCI:** May be used in headlines, subheads and quotes (if it’s what the speaker said).

**Campus Language – A Brief History:** The University of California, Irvine opened in 1965, and for much of its history has been referred to by its full name or the initials UCI. “UCI” traditionally was preferred over “UC Irvine,” in part, because in our early days the city of Irvine did not yet exist and awareness of the Irvine name was limited. Because the campus’s founders likened the abbreviated UCI name to such prestigious research universities as MIT and UCLA, the UCI identity grew in popularity. Logos were created and signs erected. Over time, “UCI” has indeed become synonymous with one of America’s leading public research universities for countless faculty, staff, alumni, students and community members. There is only one UCI!

Today, the University of California, Irvine has become known internationally for excellence in research, teaching and public service. And, thanks in no small part to the university’s success, the city of Irvine is widely regarded as a business, residential and academic center. But while the acronym UCI remains permanently etched in the minds of many, it is not always recognized or understood by those unfamiliar with the campus or outside our geographic area. Even those who recognize that “UC” stands for University of California don’t always associate our “I” with Irvine.

To address this issue, the university’s graphic identity standards include the optional use of the “UC Irvine” wordmark. Built upon the previous UCI visual identity system, UCI remains the “cornerstone” element of our signature.
Photo Style 6.0
Past

In the past, we employed a style that created striking contrasts of light and dark. Today, we are looking to better communicate the vitality and uniqueness that defines the UCI experience – upbeat, brilliant minds at work, fueled by the energetic lifestyle of Southern California.

Future

Our campus life is anything but ordinary. With the most energy efficient campus in the state, we are home to an endless well of innovations that are impacting our world right now – from engineering, medicine and public policy to theater, art and athletics. Here, the future is not just top-of-mind, it’s made. Everyday.

The imagery we create must convey this vitality to effectively tell our story and embody our defining traits*:

Pioneering
Bold
Accomplished
Ingenious

*Please review the UCI Personality Attributes on page 11.
Logo Matrix 7.0

7.1 Guiding Principles
7.2 Key Messaging
7.1 Preferred Signatures

Our logos are provided in a variety of formats for use across all media.

Here are the specifications for requesting files for logo reproduction. To request artwork, please use the contact information at the end of this document, section 8.

All versions were created using Adobe Illustrator® and are categorized using the nomenclature listed below.

**File Naming Key**

<table>
<thead>
<tr>
<th>IDENTIFIER</th>
<th>LOGO VERSION</th>
<th>COLOR VERSION</th>
</tr>
</thead>
<tbody>
<tr>
<td>uci</td>
<td>fl</td>
<td>p</td>
</tr>
<tr>
<td>uci</td>
<td>c</td>
<td>k</td>
</tr>
<tr>
<td>uci</td>
<td>cs</td>
<td>w</td>
</tr>
</tbody>
</table>

**Flush Left**

- uci_fl_p7685.eps
- uci_fl_k.eps
- uci_fl_w.eps

**Centered**

- uci_c_p7685.eps
- uci_c_k.eps
- uci_c_w.eps

**Centered – Stacked**

- uci_cs_p7685.eps
- uci_cs_k.eps
- uci_cs_w.eps
7.2 School Signatures

Our logos are provided in a variety of formats for use across all media.

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All versions were created using Adobe Illustrator® and are categorized using the nomenclature listed below.

### File Naming Key

<table>
<thead>
<tr>
<th>IDENTIFIER</th>
<th>LOGO VERSION</th>
<th>COLOR VERSION</th>
</tr>
</thead>
<tbody>
<tr>
<td>uci</td>
<td>fl</td>
<td>p</td>
</tr>
<tr>
<td>Abc</td>
<td>ffs</td>
<td>k</td>
</tr>
<tr>
<td>d</td>
<td>c</td>
<td>w</td>
</tr>
</tbody>
</table>

### School Logos

<table>
<thead>
<tr>
<th>SCHOOL</th>
<th>FLUSH LEFT</th>
<th>CENTERED</th>
<th>DONOR NAME FL/C</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. UCI Claire Trevor School of the Arts</td>
<td>uci_Art_fl_p7685.eps uci_Art_fl_p109.eps uci_Art_fl_k.eps uci_Art_fl_w.eps</td>
<td>uci_Art_c_p7685.eps uci_Art_c_p109.eps uci_Art_c_k.eps uci_Art_c_w.eps</td>
<td>uci_Art_d_fl_p7685.eps uci_Art_d_fl_p109.eps uci_Art_d_fl_k.eps uci_Art_d_fl_w.eps</td>
</tr>
</tbody>
</table>
## 7.2 School Signatures

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All versions were created using Adobe Illustrator® and are categorized using the nomenclature listed below.

### File Naming Key

<table>
<thead>
<tr>
<th>IDENTIFIER</th>
<th>UNIVERSITY OF CALIFORNIA, IRVINE</th>
</tr>
</thead>
<tbody>
<tr>
<td>uci</td>
<td>University of California, Irvine</td>
</tr>
<tr>
<td>Abc</td>
<td>3-letter Abbreviated School Name</td>
</tr>
<tr>
<td>d</td>
<td>Donor Name</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LOGO VERSION</th>
</tr>
</thead>
<tbody>
<tr>
<td>fl</td>
</tr>
<tr>
<td>fsl</td>
</tr>
<tr>
<td>c</td>
</tr>
<tr>
<td>cs</td>
</tr>
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<table>
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<tbody>
<tr>
<td>p</td>
</tr>
<tr>
<td>k</td>
</tr>
<tr>
<td>w</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SCHOOL</th>
<th>FLUSH LEFT</th>
<th>CENTERED</th>
<th>DONOR NAME FL/C</th>
</tr>
</thead>
<tbody>
<tr>
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7.2 School Signatures

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**School Logos**

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#### TABLE 1: Logos and File Specifications

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Answers 8.0
Answers

8.1 Contact Information

For questions or assistance please contact:

Strategic Communications
University of California, Irvine
100 Theory, Suite 200
Irvine, CA 92697-5615

Telephone: 949-824-6922