

# UFSC Chapter Manual

## *Running Our Chapters Like A Business*

### INTRODUCTION

The most common trait that our Chapters face today is the lack of resources readily available for them to run their chapters like a small business. We expect companies we transact business with—grocery stores, doctor’s office, bank and even our employer to perform good business practices. Why would running our Chapters be any different? This updated version of the Chapter Manual is designed to make available resources for Chapter Leaders and to give new incoming Leaders a guide on how to start.

This manual is categorized into 8 parts:

- 1) The First 90 Days**
- 2) Best Practices**
- 3) Branding and Marketing**
- 4) Chapter Development Guidelines**
- 5) Communication**
- 6) Legal Documentation**
- 7) Sponsorship/Fundraising**
- 8) UFSC Communication & National Information**

New information, as it is available, will be emailed to you to add to this manual. Keeping your manual up-to-date will help in the smooth transition of the Chapter’s business and assist incoming Chapter Leaders.

The suggestions, forms and programs in this manual are tools to aid you in enhancing the programs and systems you currently have in place or aid you in creating new ones. They are not meant to replace what already works for your Chapter, however, our goal is to work towards “Chapter Uniformity”.

# THE FIRST 90 DAYS

During the first 90 days, it is crucial that incoming Chapter Leaders receive the training needed to run their Chapters more effectively. Training for the first 90 days will help with Chapter uniformity and provide new Leaders the support they need. Beginning June 2009, incoming Chapter Leaders will receive the first phase of training during the National Conference. Phase Two covering the Chapter Leaders first 30 days in office will be held between June and July, followed by Phase Three between July and August and finally Phase Four between August and September. Training schedules, training manuals and training materials will be provided to all incoming Chapters Leaders at the National Conference. The following is a summary of the scheduled training:

## Phase One

| <i>Checklist for Chapter President Before Leaving National Conference</i> |
|---|
| Organization's Mission/Vision   |
| National Organization Chart & Contact Information                         |
| Articles of Incorporation   |
| By-Laws   |
| Strategic Plan  |
| IRS Tax Filings/Forms   |
| Year End/Interim Financial Statements                                     |
| Roles/Responsibilities of Officer   |
| Checklist of Organization's Compliance Items                              |
| Instructions for Creating/Updating Chapter Book                           |

## Phase Two

| <i>First 30 Days as Chapter President (Jun - July)</i>  |
|---|
| Obtain "Running Your Chapter Like A Business" Manual  |
| Meet with Past President to obtain list of officers; committees; members; sponsors; vendors; calendar of National, Regional, Local meetings and outstanding projects, programs, etc |
| Set up a meeting to meet with each officer and obtain their current agenda and any other necessary documents  |
| Set up meeting with committee chair to obtain their current agenda and any other necessary documents  |
| Order Business cards  |
| Update website  |
| Either email or mail Welcome Letter to members, sponsors, vendors, etc  |
| Have current bank account updated to reflect new leadership   |

### **Phase Three**

|  |
|--|
| <i>Second 30 Days as Chapter President (Jul - Aug)</i>               |
| Schedule Strategic Planning meeting with Officers & Committee Chairs |
| Make all necessary contacts with vendors and sponsors                |

### **Phase Four**

|  |
|--|
| <i>Third 30 Days as Chapter President (Aug - Sept)</i>                             |
| Hold Meet and Greet for officers, committee members, members and potential members |
| Prepare for first monthly meeting  |

# BEST PRACTICES

## CHAPTER INFORMATION HANDOUTS

- ❖ Chapter Brochure Submitted by Dallas
- ❖ Who We Are (Sponsor One-Pager Handout) Submitted by Dallas
- ❖ FACTS & FAQs Submitted by Dallas

## EVENT INFORMATION

- ❖ Event Flyer Submitted by Greater Kansas City
- ❖ Event Checklist Submitted by Greater Kansas City

## MEMBERSHIP INFORMATION

- ❖ Retention & Recruitment Plan Submitted by Greater Kansas City
- ❖ Membership Recruitment/Retention Information Submitted by Dallas
- ❖ Guidelines for Communicating & Recognizing Member & Family Member Deaths & Hospitalization Submitted by Greater Kansas City

## PARLIAMENTARIAN INFORMATION

Submitted by Christy Bryant

## PROGRAM INFORMATION

- ❖ Carrie Steele-Pitts Home Partnership Submitted by Atlanta
- ❖ “Real Life” Program Submitted by Dallas
- ❖ Paul Quinn College Workshop Series Submitted by Dallas
- ❖ McMillan 20: College Bound...Reaching for the Possible Submitted by Dallas
- ❖ UFSC Toronto Mentoring Program Submitted by Toronto

## SCHOLARSHIP INFORMATION

- ❖ Scholarship Application Submitted by Greater Kansas City
- ❖ Scholarship Application Submitted by Dallas
- ❖ Scholarship Flyer Submitted by Greater Kansas City
- ❖ Conditions for Receiving Scholarship Submitted by Dallas

## SPONSORSHIP INFORMATION

- ❖ Sponsorship Levels Submitted by Greater Kansas City
- ❖ Sponsorship Levels Submitted by Dallas

## SURVEY INFORMATION

- ❖ Workshop Survey Submitted by Dallas

## TRAVEL INFORMATION

- ❖ Travel Itinerary Submitted by Dallas

## Handouts & Brochures

### CHAPTER BROCHURE – Submitted by Dallas



(Outside)



(Inside)

## WHO WE ARE ONE-PAGER - Submitted by Dallas



### URBAN FINANCIAL SERVICES COALITION

#### **WHAT** is the Urban Financial Services Coalition & UFSC Dallas?

- UFSC is a Financial Services Industry Professional Organization.
- UFSC, established in 1974, has been in existence for 34 years. UFSC Dallas was established in 1978.
- UFSC has over 23 chapters in the U.S. and Canada. UFSC Dallas has 50 members.
- UFSC has a 501(c) 3 affiliated foundation, UFSC Foundation.
- UFSC is formerly the National Association of Urban Bankers (NAUB).

#### **WHO** is involved in Urban Financial Services Coalition and UFSC Dallas?

- Financial Services Professionals across all industry segments.
- Financial Institutions
- Corporations
- Governmental entities
- Top Financial Industry Executives & Successful Entrepreneurs
- College/University Officials, Faculty & Students
- Civic Leaders and Public Officials

#### **WHAT** are the goals of the UFSC National & UFSC Dallas?

- Empower our underserved communities with financial, credit and budgeting workshops and seminars at no cost.
- Promote careers in the financial services industry among high school and college students.
- Network and share industry expertise with Leaders and Top Executives in the financial services field.
- Promote diversity in the financial services industry workplace
- Assist individuals and companies position themselves to be successful in the financial services industry
- Provide professional development for career and personal growth.

#### **HOW** will the UFSC 34<sup>th</sup> Annual National Conference benefit participants and supporters?

- UFSC enhances Participants' contacts with key decision makers in the Financial Services Industry.
- UFSC exposes Participants to seminars and workshops from industry's top experts, thereby increasing their knowledge and skill sets.
- The workshops and seminars aid employers in exposing their employees to larger variety of training and information at a cost lower than one individual seminar or workshop.
- Participants and Supporters have the opportunity to network with other financial experts across the country.
- Participants are exposed to scholarship opportunities for continuing education.
- Supporters/Sponsors are given national exposure through their support of UFSC.



## FAQ's & FACTS

### **Who is Urban Financial Service Coalition or UFSC?**

Urban Financial Services Coalition or UFSC, is a non-profit organization of minority professionals in the financial services industry. UFSC started in 1974 as the National Association of Urban Bankers (NAUB). Members of UFSC were recognized throughout the country as “Urban Bankers”. Most of the UFSC Members work for various banks around the country. UFSC changed their name in 2000 to encompass others in the financial services industry, i.e., mortgage, insurance, securities and brokerage firms and anyone who seeks professional development. Today we have members not only in these fields, but also in legal, advertising and consulting fields.

There are 23 UFSC Chapters in the United and Canada. **NAUB Dallas (UFSC Dallas)** was chartered in 1978.

### **What is the mission of UFSC and UFSC DALLAS?**

The Mission of UFSC and **UFSC Dallas** is to be *THE* pre-eminent financial services organization that provides professional development programs, supports educational advancement and promotes economic empowerment for its members and minority communities at large.

### **How does UFSC Dallas help members and others professionally?**

**UFSC Dallas** presents programs, workshops and speakers that directly benefit members and their employers by helping its members and non-members with professional development that aid them in performing their job. Members and Non-Members have the opportunity to attend free or at minimal cost UFSC programs and workshops with industry experts through its partnership with The University of Phoenix Lunch and Learn Program, monthly meeting and activities, mentorship partnering and public seminars.

### **How does Urban Financial Services Coalition help the communities they serve?**

UFSC chapters and **UFSC Dallas** provide seminars for the public on Debt/Credit Management, Budgeting, Financial Planning, Resume Writing, Mock Interviewing, How to get Free Publicity for your Business, Branding Yourself and other workshops through its **UFSC Dallas** Signature Programs. Members tutor students and participate in school programs and mentoring programs. Members volunteer in civic activities and partner with other networking groups. UFSC Chapters and **UFSC Dallas** provide scholarships to graduating high school seniors as well as provide financial assistance to community projects that UFSC has an interest in.

#### **UFSC Dallas Signature Programs:**

- Financial Professional in the Making Workshop Series: This workshop series is targeted to high school seniors and college students and offers Resume Writing, Mock Interviewing, Debt/Credit Management, Budgeting, Making a Good First Impression, The First 90 Days on the Job and Dealing with Difficult

People. UFSC Dallas has expanded this Series by tailoring a program for Paul Quinn College students, entitled the **Paul Quinn College Workshop Series**.

- Senior Care Workshop Series: This workshop series targeting Senior Citizens offers Reverse Mortgage information, Medicare Insurance information, Identity Theft Targeting Seniors.
- Youth Workshop Series: This workshop series targets school children, offers Career Day Presentations, Leadership Training, Financial Literacy and Bank at School.
- McMillan 20: College Bound...Reaching for the Possible: Started in 2003, this is **UFSC Dallas** Mentoring Program consisting of twenty, now 8<sup>th</sup> grade students, 2003 3<sup>rd</sup> grade class of J.J. McMillan Elementary School in Dallas, Texas. **UFSC Dallas** mentors these students and will provide scholarships for them when they graduate high school and enter college in 2012.

### **How is the UFSC structured?**

There are 5 regions under the national tier. They are the Western, Eastern, Southern, Southwest and Central Regions. Chapters fall under these regions according to their demographic areas. **UFSC Dallas** falls under the Southwest Region along with the Arkansas Chapter and Greater Kansas City Chapter. Each Region is headed by a Regional Vice President and Regional Representative who report to the National Vice President. Lynette Fletcher (UFSC Dallas's Executive Director) and Yashica Bell (UFSC Dallas McMillan 20 Chair) serve as the 2007/2008 Southwest Regional Vice President and Regional Representative.

### **Who are UFSC Dallas Corporate Sponsors and Partners?**

Guaranty Bank, Citi, JPMorgan Chase, Comerica Bank, Regions, RBC Dain Rauscher, Unicorp Services, Inc. (Loan Exchange Sales), Wells Fargo, Bank of Texas, YMCA - Southern Sector, The University of North Texas – Dallas Campus, Forever Memory Blankets, Already Gear and Chef TLC.

### **Why is UFSC Dallas important?**

With the phenomenon of bank mergers resulting in workforce downsizing, **UFSC Dallas** members and others find themselves suddenly unemployed. It does not matter if you dedicate your life to a corporation 25 years, 5 years or even 5 months, you still need the skills and information to keep you in tune with an ever-changing corporate environment. **UFSC Dallas** offers timely information by providing speakers, seminars and workshops that will enable members to stay on pace with their respective work life. **UFSC Dallas** plays a large part in providing financial, life and working skills workshops to the community it serves with special focus on students, senior citizens and financial professionals in the making.



## FACTS

National Associates of Urban Bankers (NAUB) was established in New York in 1974. It became a national entity in 1977.

The organization changed its name to Urban Financial Services Coalition (UFSC) in 2000.

There are 23 UFSC Chapters located in the United States and Canada.

**UFSC Dallas** was established in 1978 and currently has 50 members.

**UFSC Dallas** in 2003 established the “McMillan 20: College Bound...Reaching for the Possible Mentorship Program” which consists of 20 middle-grade students. **UFSC Dallas** has committed to provide mentoring and scholarships totaling \$4,000 per year for these students until they graduate high school and enter college in 2012.

UFSC nationally has awarded over \$500,000 in scholarships to deserving graduating high school and college students during the organization's existence.

UFSC National ([www.ufscnet.org](http://www.ufscnet.org)) will hold its 34<sup>th</sup> Annual National Conference of UFSC in Minneapolis, Minnesota, June 19 – June 23, 2008.

The Greater Kansas City Chapter hosted the Southwest Regional Business Meeting of UFSC March 27-29, 2008 in Kansas City, Missouri. The 2009 Southwest Regional Business Meeting will be held in Houston, Texas.

**UFSC Dallas** will continue to provide professional development programs, support educational advancement and promote economic empowerment for the communities they serve.

## Event Information

EVENT FLYER – Submitted by Greater Kansas City



Greater Kansas City

*Come join our*

### **1<sup>st</sup> 2008 Membership Empowerment Luncheon**

**Topic:** *"State of UFSC-GKC: Where We Are Now, Where We Are Going, and How You Can Get Involved, Leverage Your Business Expertise and Enhance Your Business"*

**Speaker:** UFSC-GKC President Ola M. Truelove

**Tuesday, February 12 @  
11:30 a.m.**

**Terrace Buffet, Semi-Private Room, Argosy Hotel, Riverside, MO**

#### **Directions:**

- ⇒ Take 169N and merge onto MO-9N toward Riverside/Parkville.
- ⇒ Take the exit toward US-69 N/Riverside and turn left onto NW Briarcliff Pkwy.
- ⇒ Turn right onto NW Tullison RD/W Outer RD and continue to follow NW Tullison RD.
- ⇒ Turn left onto NW Argosy Pkwy.



**RSVP by end of day Friday, February 8 by contacting Debra Bronston at [debra.l.bronston@kc.frb.org](mailto:debra.l.bronston@kc.frb.org) or (816) 881-2212. A buffet meal will be available in the Terrace Buffet and will cost \$10.99. Payment should be made at the cash register. Feel free to bring a guest!**

## EVENT CHECKLIST - Submitted by Greater Kansas City



**Greater Kansas City**

### Event Check List

**2007-2008**

| Event  | Person(s) Responsible |
|--|-----------------------|
| <b>Membership Empowerment Luncheons Held at FRBKC</b>  |                       |
| Agree on luncheon topic and guest speaker  | Ola Truelove          |
| Contact guest speaker, reach agreement, and follow-up with confirmation e-mail regarding: <ul style="list-style-type: none"> <li>• Luncheon logistics;</li> <li>• Equipment and handouts; and</li> <li>• Parking</li> </ul>                              | Ola Truelove          |
| E-mail invitation to current and potential members with RSVP date. Send luncheon meeting reminder one week before and day before luncheon. Remind guests that they are responsible for the cost of the meal if they RSVP and fail to attend the luncheon | Debra Bronston        |
| Place meeting announcement on website  | Debra Bronston        |
| Contact Dining to arrange luncheon, complete a Dining Request Form, and send to Joyce Mahoney or Ray Warren  | Debra Bronston        |
| Contact Protection Department to inform them of meeting  | Debra Bronston        |
| Contact Facilities Management Department and arrange: <ul style="list-style-type: none"> <li>• Hanging of Banner</li> <li>• Podium and Portable Microphone</li> <li>• Table in Foyer for Sign-ins</li> </ul>   | Debra Bronston        |

|   |                               |
|---|-------------------------------|
| Solicit door prizes from Board members  | Ola Truelove                  |
| Create RSVP log and give to person responsible for recording RSVPs  | Debra Bronston                |
| Create sign-in sheet  | Debra Bronston                |
| Create name badges and final guest list and submit to Security Vestibule  | Debra Bronston                |
| Create framed certificate for guest speaker   | Ola Truelove                  |
| Prepare sign-in table with following information: <ul style="list-style-type: none"> <li>• Decorations</li> <li>• Sign-in sheet and ink pens</li> <li>• Welcome signs</li> <li>• Business card bowl</li> <li>• Receipt book</li> <li>• Information packets: <ul style="list-style-type: none"> <li>• Agenda</li> <li>• Speaker Biography</li> <li>• Financial Statement</li> <li>• Flyer on Upcoming Event</li> </ul> </li> </ul> | Debra Bronston                |
| Greet guests in security vestibule and escort them to and from dining room  | Jeff Legette                  |
| Greet guests at sign-in table   | Nigel Davis                   |
| Greet guests in dining room   | Turner Pettway & Ola Truelove |
| Record luncheon minutes   | *                             |
| Validate parking at end of luncheon   | Nigel Davis                   |
| Arrange for banner and other supplies to be removed from dining room and placed in UFSC-GKC storage area  | Debra Bronston                |
| Place luncheon photos on UFSC-GKC website   | Debra Bronston                |
| Send invoices to attendees and no-shows who did not pay at the door   | Nigel Davis                   |
| Send luncheon minutes to board of directors for review and to become a permanent part of UFSC-GKC's records   | *                             |
| Place sign-in sheet in permanent files  | Debra Bronston                |
| Deposit proceeds in checking account  | Nigel Davis                   |
| <b>Special Events</b>   |                               |

|   |                                 |
|---|---------------------------------|
| Submit proposal to Board of Directors for approval  | Ola Truelove                    |
| Arrange pre and post media coverage   | Debra Bronston                  |
| Place event on website as a special announcement  | Debra Bronston                  |
| Arrange logistics with those in charge of meeting place   | Ola Truelove                    |
| Send e-mail invitation to members and others  | Debra Bronston                  |
| Create event brochure   | Debra Bronston                  |
| Create event sign-in sheet  | Debra Bronston                  |
| Send reminder one week before and day before special event.   | Debra Bronston                  |
| Prepare sign-in table with following information: <ul style="list-style-type: none"> <li>• Decorations</li> <li>• Sign-in sheet and ink pens</li> <li>• Welcome signs</li> <li>• Business card bowl</li> <li>• Receipt book</li> <li>• Event brochure</li> <li>• Name badges</li> </ul> | Debra Bronston                  |
| Check meeting room setup early on the morning of special event  | Ola Truelove                    |
| Greet guests at sign-in table   | Nigel Davis and Jeff Legette    |
| Greet guests in meeting room  | Turner Pettway and Ola Truelove |
| Arrange for banner and other supplies to be removed from meeting room and placed in UFSC-GKC storage area   | Debra Bronston                  |
| Place meeting photos on UFSC-GKC website  | Debra Bronston                  |
| Send invoices to attendees who did not pay at the door  | Nigel Davis                     |
| Place sign-in sheet in permanent files  | Debra Bronston                  |
| Deposit proceeds in checking account  | Nigel Davis                     |



## Membership Information

### RETENTION/RECRUITMENT PLAN – Submitted by Greater Kansas City



*Greater Kansas City*

#### Retention/Recruitment Plan

##### Strategy for Current Members:

- ☐ Send renewal letters to current members at the beginning of each fiscal year that includes previous year's accomplishments, benefits of remaining paid members, and encouragement to remain/become involved in committee work.

##### Strategy for New Members:

- ☐ New Membership Orientation and identification of committee involvement after regular Membership Empowerment Meetings
  - ☐ Review of Membership Information Packet
  - ☐ Project solicitation
  - ☐ Submission of New Membership Orientation Summary Sheets to appropriate leaders
- ☐ Membership certificates presented and photos taken of new members during Membership Empowerment Meetings and placed on website and in newsletters

##### Strategy for Potential Members:

- ☐ Membership drives at chapter events
- ☐ Membership drives at community events

##### Strategy for Corporate Calls:

- ☐ Identify contacts at employers of current members and associates who are not paid members
- ☐ Send Membership Information Packet and cover letter stating that they should expect a call

- ❑ Call contacts and establish a meeting time and location with Corporate Calling Team:
  - Board member
  - Paid members
  - Resource Development Leader
  - Employee of corporation
- ❑ Content of Corporate Calls:
  - Request corporate membership and permission to have membership drives on premises (Membership Caller)
  - Request Financial/In-Kind Contributions (Resource Development Leader)
  - Request contact information for Public Relations Coordinator and permission to send newsletter and advertise chapter events via internal communications (Board Member)
  - Recognize new Corporate Sponsors in newsletter and on website

#### **Strategy for Student Members:**

- ❑ Identify minority student group contacts and events at KU, Rockhurst, and UMKC
- ❑ Meet with student group contacts:
  - Present Membership Information Packet
  - Ask for opportunities to host meetings with groups on campus
- ❑ Host meetings:
  - Meeting advertisements
  - Meeting Sign-In Sheets
  - Refreshments
  - Membership Information Packet and token gifts
  - PowerPoint Slides and Talking Points
- ❑ Establish mentor relationships with students and existing members
- ❑ Include students in membership database and communications
- ❑ Invite students to attend Membership Empowerment Meetings and other events
- ❑ Assign student committee responsibilities
- ❑ Encourage students to participate in scholarship program
- ❑ Seek and refer students for internships and full-time employment
- ❑ Feature students in newsletters

#### **Workplan**

| Task | Time Frame | Person Responsible | Comments |
|------|------------|--------------------|----------|
|------|------------|--------------------|----------|

|   |  |  |  |
|---|--|--|--|
| Enhance Membership<br>Brochure with photos and<br>listing of membership benefits  |  |  |  |
| Maintain current membership<br>invoice  |  |  |  |
| Develop renewal letter<br>templates:<br><br><input type="checkbox"/> Individual<br><input type="checkbox"/> Corporate                                 |  |  |  |
| Develop interest letter<br>templates:<br><br><input type="checkbox"/> Individual<br><input type="checkbox"/> Corporate                                |  |  |  |
| Develop interest ad for<br>newsletter   |  |  |  |
| Maintain Membership<br>Database   |  |  |  |
| Establish membership<br>application website link to<br>appropriate board member   |  |  |  |
| Develop welcome<br>e-mail template  |  |  |  |
| Maintain and send E-Birthday<br>cards to all members and<br>associates and Missing You to<br>persons who frequently miss<br>meetings and other events |  |  |  |
| Talking Points:   |  |  |  |

|   |  |  |  |
|---|--|--|--|
| <ul style="list-style-type: none"> <li>❑ Membership Empowerment Meetings</li> <li>❑ New Member Orientation</li> <li>❑ Corporate Calls</li> <li>❑ Student group presentations</li> </ul>   |  |  |  |
| <p>Purchase Materials for Membership Certificates:</p> <ul style="list-style-type: none"> <li>❑ Mats</li> <li>❑ Certificate Paper</li> <li>❑ Seals</li> <li>❑ Ribbons</li> </ul>  |  |  |  |
| Purchase Token Gifts  |  |  |  |
| <p>Develop New Membership Orientation Summary Sheets:</p> <ul style="list-style-type: none"> <li>❑ Date and location of meeting</li> <li>❑ Information of attendees to include in membership database</li> <li>❑ Identification of appropriate board member to which information should be forwarded</li> </ul> |  |  |  |
| Monitor newspaper and television for community events and determine logistics of participation in events  |  |  |  |
| Work with Marketing to ensure availability of current display, banner, camera and other marketing materials   |  |  |  |

|   |  |  |  |
|---|--|--|--|
| Determine logistics and responsibilities of corporate calls                                 |  |  |  |
| Determine logistics of student membership development                                       |  |  |  |
| Establish regular project planning meeting dates, times, locations, and agendas             |  |  |  |
| Determine yearly budget and calendar of events and submit information to Board of Directors |  |  |  |



## **MEMBERSHIP RECRUITMENT & RETENTION INFORMATION – Submitted by Dallas**



### **Membership Recruitment & Retention Information**

#### **OUR MISSION**

To welcome New Members to UFSC and to retain them by keeping them engaged, active and encouraged.

#### **OUR MOTTO**

No New Member Left Behind

To welcome New Members to Urban Financial Services Coalition, the following information will be given to them within 10 days once we receive their application and membership fee:

#### **WELCOME PACKAGE**

- A Welcome Letter
- By-laws of Urban Financial Services Coalition
- A Membership Roster
- Committee Interest Form
- A list of local UFSC Executive Board Members, Committee Chairs and Committee Descriptions
- A calendar of Events and Meetings
- UFSC Dallas Facts & FAQ's
- An overview of the National and Regional organization structure, including a list of all chapters in our region.
- Information regarding the Mid-Winter Board Meeting and National Conference.

#### **INFORMATION AVAILABILITY**

This following information will be available at every UFSC meeting or event:

- Membership Application
- Welcome Packages
- Membership Update Form
- Chapter Brochure Information and information about Upcoming Events
- Bio & Photo Request Form

#### **MEMBERSHIP PROCESSES**

- Send Membership Package within 10 days after membership application and fee is received.
- Send membership renewal invoices by email 60- 90 days before expiration.
- Contact Members who miss 3 consecutive meetings.
- Forward Committee Interest Forms to Committee Chairs within 10 days.
- Submit new member name and email information to email distribution list within 10 days

#### **MEMBERSHIP RETENTION**

Send birthday and condolence cards to the membership

Contact New & Existing Members who miss 3 consecutive meetings.

Send membership renewal invoices by email 60-90 days before expiration.

Connect a buddy. Partner new members with existing members

Work with the Public Relations Committee to highlight new members in the monthly newsletter

### **MEMBERSHIP BENEFIT**

Host a Membership Networker quarterly

Professional Development

Access to potential clients, recruiting opportunity and new business

Personal give back from volunteer opportunity in our mentoring programs

Conference registration discount to the National Conference

Member discount to all local UFSC sponsored events

Opportunity for an all-expense paid trip to the National Conference by becoming the Member of the Year

**GUIDELINES FOR COMMUNICATING AND RECOGNIZING MEMBER AND  
FAMILY MEMBERS DEATHS AND HOSPITALIZATION – Submitted by Greater  
Kansas City**

**Urban Financial Services Coalition-Greater Kansas City  
Guidelines for Communicating and Recognizing Member and Family Members Deaths and  
Hospitalization**

The communication and recognition of death and hospitalization of Members, Advisory Board Members, and family members shall be the responsibility of the Marketing Committee.

**Deaths**

**Communication**

As the Marketing Committee is notified via telephone, e-mail or media of deaths of paid members, Advisory Board members, and their immediate family members (parent, spouse, child, sibling), the related obituary information is immediately posted on the website and later in the semi-annual newsletter. Individuals on the UFSC-GKC Members and Friends database are notified via e-mail of the deaths, funeral plans, and plans to send flowers or a charitable cash contribution on behalf of UFSC-GKC.

**Recognition**

Based on the information received, the Marketing Committee sends flowers or a charitable cash contribution, based on the surviving members' wishes. The cost of the flowers or the amount of the cash contribution shall not exceed \$50. This amount does not include delivery fees and taxes associated with sending flowers. The Marketing Committee shall submit a summary of benevolence expenses and all invoices to the Treasurer in time for the expenses to be included in the monthly financial statements submitted by the Treasurer to the Board of Directors' at its regular meeting. The Treasurer shall maintain supporting documentation related to these expenses, both as a matter of record and to be used as part of the regular audit.

**Hospitalization**

**Communication and Recognition**

As the Marketing Committee is notified via telephone or e-mail of the hospitalization of paid members and Advisory Board members, flowers are sent to these persons on behalf of the UFSC-GKC. The cost of the flowers shall not exceed \$50. This amount does not include

delivery fees and taxes associated with sending the flowers. The Marketing Committee shall submit a summary of benevolence expenses and all invoices to the Treasurer in time for the expenses to be included in the monthly financial statements submitted by the Treasurer to the Board of Directors' at its regular meeting. The Treasurer shall maintain supporting documentation related to these expenses, both as a matter of record and to be used as part of the regular audit.

## Parliamentarian Information

**PARLIAMENTARIAN'S BEST PRACTICES – Submitted by Christy Bryant, UFSC  
National Parliamentarian**



### Parliamentarian's Best Practices

*Christy Bryant*  
*UFSC National Parliamentarian*





# Table of Contents

- ❑ **Chapter Parliamentarian**
  - ❑ **Roles & Responsibilities**
    - ❑ **Before/During meeting**
    - ❑ **Bylaw changes**
- ❑ **Best Practices**
- ❑ **Resources**



## Chapter Parliamentarian Before a meeting:

Be prepared!

- The president, knowing what will come before the assembly, will confer with the parliamentarian in order to anticipate any problems that may arise and to avoid.
- Review the meeting agenda with the President.
- Remember your role is to be impartial.
- Know the number of voting members required for a quorum at the meeting.
- If you are unable to attend, work with the President to have someone serve in this capacity at the meeting.
  - The Parliamentarian should be in attendance at all board and chapter meetings.



## Chapter Parliamentarian During the Meeting:

- Parliamentarian's role is purely an advisory and consultative one – parliamentary law gives the chair alone the power to rule on questions on order or to answer parliamentary inquiries.
- Should be limited to giving advice to the chair and when requested, to any member.
- As inconspicuously as possible, to call the attention of the chair to any error in the proceedings that may effect the substantive rights of any member or otherwise do harm.
- There should be an understanding between the parliamentarian and the presiding officer that there may be occasions when it may be essential for the chair to listen to suggestions being made by the parliamentarian.



## Chapter Parliamentarian: During the Meeting (cont.)

- When advising the chair, the parliamentarian should not wait until asked for advice – that may be too late.
- An experienced parliamentarian will often see a problem developing and be able to head it off with a few words to the chair.
- Only on the most involved matters should the parliamentarian be called upon to speak to the assembly; and the practice should be avoided if at all possible.
- The parliamentarian should be assigned a seat next to the chair, to be convenient for consultation in a low voice.
- After the parliamentarian has expressed an opinion on a point, the chair (not the parliamentarian) has the duty to make the final ruling and has the right to follow the advice of the parliamentarian or to disregard it.



## Chapter Parliamentarian: Bylaw Changes

*Source of changes:*

- From the Board of Directors
- From a committee
- From individual members
- Recommendation from the Parliamentarian

• *Action by the Parliamentarian:*

- Refer to Chapter Bylaws
  - Report on the impact/consequences of the change (intentional, as well as unintentional)
  - Refer to National Bylaws - Must not be in conflict with the National organization's Bylaws
- Convene a Bylaws review committee, if warranted
- Follow dictate of Chapter Bylaws – Amendment process



## Best Practices:

- **Insure the National office and National Parliamentarian has the most current copy of the Chapter Bylaws.**
- **Pass on any records to the newly appointed Parliamentarian.**
  - **Current copy of Chapter Bylaws**
  - **Current copy of National Bylaws (link to website)**
  - **Notebooks/records**
    - Resources
    - Website links
- **Be available to consult, if requested.**





# Best Practices:

## Executive Board Meetings

### **Conference Calls**

- ▶ Meeting requirements should be the same (quorum, etc.).
- ▶ Voting on motions should be done via Roll call, but may not be required when there is general consensus.
- **Handling voting items:**
  - ▶ Generally speaking, any board decision that is financial in nature, requires a motion.



# Best Practices:

## Handling voting items via EMAIL

- **Step 1:** An email of the motion is sent by a voting member (never the president).
- **Step 2:** An email to second the motion is sent by a different voting member (never the president).
- **Step 3:** The President sends the email to the assembly (board and/or eligible voters) acknowledging the second to the motion along with directions on the voting deadline and to whom to send the vote (via email).
- **Step 4:** Each eligible voting member responds with his/her vote – a simple YES, NO or ABSTAIN (cc: the President, Secretary, and Parliamentarian).
- **Step 5:** The Secretary or Parliamentarian sends an email to announce the results of the voting.
- **Step 6:** Any voting items approved via email should be ratified at the next face-to-face meeting of the body (executive board, chapter meeting, etc.).







## Best Practices:

- ▶ **When in doubt – ASK!**
- ▶ **Utilize resources at your disposal.**
- ▶ **Help train your board and members on parliamentary procedures.**
- ▶ **Become a member of the American Institute of Parliamentarians.**
- ▶ **Become a certified Parliamentarian as recognized by the National Association of Parliamentarians (NAP).**



## Resources

- UFSC Chapter Bylaws
- Hardcopy of Robert's Rules of Order Newly Revised (current edition)
- Quick reference guides ([www.quickstudy.comm](http://www.quickstudy.comm))
- UFSC National Bylaws (copy on National website)
- UFSC National Parliamentarian
  - ▶ Christy Bryant ([christy.bryant@bankofamerica.com](mailto:christy.bryant@bankofamerica.com))
  - ▶ 704-683-5533 (o), 704-321-2902 (h)
- Websites:
  - ▶ Have a question? Post it to this website:  
<http://www.robertsrules.com/cp/Scripts/ASP/forum/>
  - ▶ Interested in joining the American Institute of Parliamentarians or have a question?  
[www.parliamentaryprocedure.org](http://www.parliamentaryprocedure.org)
  - ▶ Interested in gaining Regular member status with the National Association of Parliamentarians? Go here to get the details:  
[www.parliamentarians.org](http://www.parliamentarians.org)

## **Program Information**

### **UFSC ATLANTA AND CARRIE STEELE-PITTS HOMES PROGRAM – Submitted by Atlanta**

UFSC – Atlanta has a great partnership with a unique institution called the Carrie Steele-Pitts home. Under the leadership of its executive director, Olivette Alison, Carrie Steele-Pitts is a private, nonprofit, and nondiscriminatory child caring agency that provides 24-hour state approved residency for neglected, abandoned, abused or orphaned children. Through the services of caring, informed, and responsible staff, the home aims to maintain a family environment that fosters the physical, social-emotional, mental and spiritual development of each child.

UFSC- Atlanta has been a partner with Carrie Steele-Pitts home for over 8 years. We enjoy our annual Back to School drive for them, as well as other great activities. We recently partnered with the United Way for the Carrie Steele-Pitts annual field day. The day was an opportunity for the children to enjoy a day full of activities, games, and building camaraderie amongst themselves. The Volunteers from UFSC- Atlanta and the United Way were responsible for ensuring that this was a day to remember for the children.... a day of fun, friends, and future positive memories.

UFSC- Atlanta is committed to ensuring that we make at least 3-4 visits per year to Carrie Steele-Pitts home, and that we are available for special events whenever possible.

Our contacts from UFSC-Atlanta are the Chapter President, Andre Sanders and the Chapter Vice President, Jibri Fox. Andre and Jibri are key to ensuring that our partnership remains strong with this very important organization in the Atlanta community.

## **“REAL LIFE” PROGRAM – Submitted by Dallas**

The “Real Life” Program is a joint project under Urban Financial Services Coalition-Dallas (UFSC-Dallas) Youth Workshop Series and the \_\_\_\_\_.

### Purpose:

The “Real Life” Program puts students in simulated “real life” financial situations by allowing them to make “real life” financial decisions. This program will show the students:

- The importance of saving for the future.
- How to manage a budget by learning the difference between a “necessary expense” and an “I just want it! expense”.
- What does it mean to have a Good Credit Rating?
- How choosing a career can determine your standard of living.
- What does depositing, withdrawing and borrowing money from a bank mean?

### Participants:

Students (elementary or junior high school)  
Community Directors, Teachers,  
UFSC Members

### Setup:

Students will be issued a “real life” career to act out during this six-week program. Their career will list their average income, their expected bi-weekly average paycheck and their necessary expenses such as mortgage, rent, utilities, vehicle, insurance, etc. Students acting out in their career role will have to make “real life” decisions about managing their debt based on their career income.

Students will also set-up a simulated bank where students will act as Bank Managers, Tellers and Lenders. Students will learn how to make deposits, withdrawals and about borrowing money. Students will learn:

- What does it mean to Borrow Money?
- What is an Interest Rate?
- Why it is important to maintain a Good Credit Rating?

### End Result:

Most of parents agree that their children have no clue as how household expenses are managed. Students will learn first-hand how the household expenses are handled by managing their own money while learning about savings for the future, careers choices and accepting personal responsibilities.

## **PAUL QUINN COLLEGE WORKSHOP SERVICES – Submitted by Dallas**

Program Title: Paul Quinn College Workshop Series – “All About the I.C.E.” – Inspired, Committed, Empowered

Project Need: Dallas has a high ratio of undereducated citizens in minority community. Only 12% of African Americans in Dallas have college degrees compared to 61% of the population for total Dallas citizens. The central purpose of the Paul Quinn College Workshop Series is to expose students to professional African American role models. The goal is to fortify the benefits of a college education. The modules presented in the Paul Quinn College Workshop Series are designed to address areas where students are most vulnerable. They include financial literacy, health and welfare issues, job readiness, personal and workforce socialization and other issues that students face as they prepare for independence and self-sufficiency. UFSC-Dallas will mentor Paul Quinn College students and encourage completion of their college education and enhance their technical, social and coping skills to prepare them for life after college.

In recent years Paul Quinn College like many small historically black colleges and universities has experienced reduced funding and consequently reduced staffing. The college solicits volunteer participation to support activities outside of its core curriculum. UFSC Dallas members are professionals in various disciplines across the financial services industry. In addition many UFSC members have expertise in other areas such as Human Resource Management and Information Technology and volunteer their services to support Paul Quinn College.

Project Description and Plan of Action: The Paul Quinn College Workshops Series will include 10 modules to be presented in two hour sessions on a monthly basis during the school year, beginning in August 2007 and ending in May 2008. Three modules will address Financial Literacy and seven modules will address General issues facing college students. Average attendance is expected to be 100 students per session. All presenters will be members of UFSC Dallas who will volunteer to be presenters for the workshops. There will be no paid positions. Module topics will be:

Financial Literacy

- Budgeting: Geo or Jaguar?
- Debt & Credit Management
- Employer Investment Vehicles

Pay it Forward: Deposits in the Bank of Reciprocity

Giving Back: Reach One, Teach One - Volunteer Service to the Community

Dorm Room to Boardroom: Student to Employee Transition

Making a Good First Impression

- Professional

- Socially

Resume Writing Workshop: Selling Yourself on Paper

Mock Interviewing: Leaving a Lasting Impression

The First 90 Days: Setting the Course for Future Success

Program Needs & Collateral: Printing and Supplies, Program Materials, Refreshments, Incentives, Advertising and Marketing, Students Subscriptions to Wall Street Journal and Black Enterprise Magazine

Project Start Date: August 15, 2007

Project End Date: May 30, 2008

Total Project Budget: \$15,000.00



## **MCMILLAN 20: COLLEGE BOUND REACHING FOR THE POSSIBLE**

### **Submitted by Dallas**

The Dallas Chapter of the Urban Financial Services Coalition (UFSC Dallas) is excited about what we hope will increase the chances of college enrollment and graduation of 20 very special students. The program, “McMillan 20: College Bound...Reaching for the Possible”.

Rosalind Smith, a teacher with J.J. McMillan gave her 2003 3<sup>rd</sup> graders an assignment to write to the Presidents and/or Chancellors of Historically Black Colleges and Universities for college information. The students received personal letters, college memorabilia and an invitation to attend their college upon their graduation from high school. When UFSC learned of the project and the impact of what could happen if you started college preparation at a young age, we wanted to be involved.

We support the students and their parents with information, activities and financial aid that will be helpful increasing their chances for college enrollment. UFSC Dallas will credit each student \$200 per year until they are ready for college in 2012.

UFSC – Dallas Chapter has committed to work with these 20 students and their parents in order for them to achieve their goals of enrolling in college.

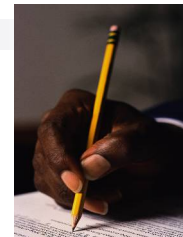


www.ufsc-toronto.org  
The Urban Financial Services Coalition  
- Toronto Chapter

# UFSC Toronto Mentoring Program

## Mentoring Program

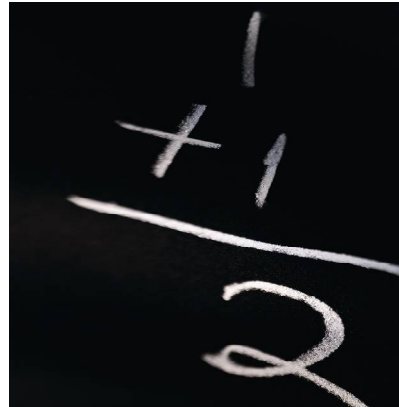
- Exposes Regent Park youth from Priority neighbourhoods to mentorship from successful minority financial professionals.
- Toronto chapter volunteers meet one-on-one with Grade 7 & 8 students for lunch at least once a month.
- Committee Heads, plan one event during the school year; Lunch & Learns
- Students plan an appreciation event for mentors at end of the school year



www.ufsc-toronto.org  
The Urban Financial Services Coalition  
- Toronto Chapter

## Nelson Mandela Park P.S.

- FORMATION
- MAINTAINANCE
- GROWTH



## Bank of Montreal: Lunch & Learn

- In an effort to give these promising minority students greater exposure to a corporate environment, BMO Financial Group has generously sponsored a lunch session at their head office.
- The lunch event included:
  - ☐ Trading Floor Tour
  - ☐ Sample Stock Chart
  - ☐ Trading Game
  - ☐ Prizes
  - ☐ Lunch







## Our Recommendations



- Develop close relationships with a local School
- Have the following Forms completed:
  - ☐ Police Check
  - ☐ Volunteer Information Form
  - ☐ Parental Consent (Permission Form)
- Marketing:
  - ☐ Recruit Mentors 2 months prior
  - ☐ Share Experiences at General Meeting (Mentors & School Teachers)
  - ☐ Testimonials on Chapter website
  - ☐ Advertisement in Local Magazines and Newspapers



The Urban Financial Services Coalition  
- Toronto Chapter



Nelson Mandela Park Public School  
440 Shuter, Toronto, Ontario M5A1X6  
• Tel: 416.393-1620 • Fax: 416.393-1616

March 27, 2008

Dear Mr Andrew Garrett,

On behalf of the students, parents and teachers at Nelson Mandela Park Public School I would like to thank you for the wonderful and enriching experience you offered our students. When I told them about the opportunity most had a very difficult time articulating any understanding of financial markets. They left with a good understanding of trading and banking.

Please extend our thanks to all of the staff at BMO for the wonderful presentations and the game. They were both interesting and informative and the students came back to school excited to tell their peers and teachers all about trading and markets.

They also left with something that is intangible and irreplaceable- they left dreaming that they would someday be where you are. This is so valuable to our students as most of them never have the opportunity to experience the type of work environments and role modeling that our visit provided them with.

Thank you for organizing the trip, the interesting tour, the games and lecture about markets. BUT most importantly thank you for inspiring Ashley to read the newspaper, Mohammed to consider business if his NBA dream does not work out and for Adilson vowing to try harder in school, Kenrick wanting to be a real estate agent, and for the work you do here every month inspiring students to imagine their futures.

Sincerely,

*Elizabeth Schaeffer*

Elizabeth Schaeffer  
Nelson Mandela Park P.S.



Thank you for letting us go to BMO. Thank you for teaching us about the market and for the food. Thank you for give us this opportunity to learn and see what we can be.

Thank you for letting us get a tour of the bank and teaching us how to be business people. Showing us how to do trade backs was a lot of fun. Also the lunch it was yummy. The game we played was fun and exciting. In the future I might be a business person. Thank you very much. I hope we could come again soon.

Thank you,

Tianna

Thank-you for the wonderful time I will like to get to know more about trades & marketing. I have been reading the newspaper & found lots of thing about rates & marketing. One day I will like to work with you in the BMO. Well I learned a lot & had fun.

Sincerely,

Ashley Sidney Fraser

P.S. Meet You In The Future

Thank you for hosting a nice event for us. We would like to thank you for giving us the lunch. Everyone liked the food you provided and the tour of the floor. My team won the business game and it was fun. Thank you for the prizes of candy and sugar! I think I want to be a real-estate agent and knowing about business will help me a lot. Thank you again for the wonderful opportunity.

Thank you,

Kenrick Lewis

Adilson

Thank you for the lunch and for the tour. I learned a lot about the trading floor and the different jobs people have on that floor. I have considered business as one of my possible professions and I appreciate you taking the time to teach me about the possibilities available.

Thank You,

Trevor

Thank You,  
Moises

Thank you for letting Nelson Mandela students come to BMO. Thank you for teaching us about trading exchange, stocks and how to make a good trade. Also we appreciated the fabulous lunch we had! Thank you for giving me this opportunity and I really appreciate it.

Thank You,

Issac

I want to thank you so much for inviting us and opening our eyes to the different pathways in which we can choose. I think it is really important for us youth to be exposed to positive things like that so we know that there is always hope and that our dreams can always come true if we put our minds to it. Once again, A BIG THANK YOU!

Winnie

Thank you and everyone involved in the BMO learning tour and lunch. At first I thought working in a bank was boring, but now I know something about it I think different. Usually when people ask me where do I want to work I kno't know. After this tour I can give them a real answer and say that I think I want to work in financial business. I thank you because you really showed me a lot about what I could be in the future.

Thank You  
Andre

Thank you, and everyone involved with putting the tour of BMO together for us. I went on this tour and I use to think that people who work at banks were poor and they did not have a lot of knowledge in them. After the tour I now know that bank workers are well paid and very educated to do the hard work they have to do. I also learned that bank workers come to work at different times of the day, morning, night and afternoon in order to talk to people in different time zones around the globe.

Just again I want to thank you for teaching us children and adults (Elizabeth) things we never knew before. Now I know what really happens in banks and I can tell people who know and make a good decision for my future.

Yours Truly,

Habib

I want to thank you for the lunch and learn we had the other day. I learned a lot about the exchanges you guys do, how to make good deals for good trade backs and money. I also liked the lunch you made for us and the game we played with the circle, triangle, rectangle etc.. BMO is a great place for business, now I want to be a businessman If I am not an NBA player.

Thank you for the lunch and learn.

Mohamed

# Scholarship Information

## SCHOLARSHIP APPLICATION

Submitted by Greater Kansas City



*Greater Kansas City*

Scholarship Application

(Please print or type.)

Name \_\_\_\_\_

Mailing Address \_\_\_\_\_

Telephone \_\_\_\_\_ E-Mail Address \_\_\_\_\_

High School and/or College/University \_\_\_\_\_ Major \_\_\_\_\_ GPA \_\_\_\_\_  
(Please attach official transcript.)

Extracurricular Activities

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Community Service

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Work Experience

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please Explain Your Decision to Work in the Financial Services Industry (if applicable).

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How Are You Preparing for a Career in the Financial Services Industry After College Graduation (if applicable)?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There is no handwriting or other markings on the paper.

Following are the available presentation topics. Please place a check mark by your topic selection.

- Ms. Debbie Dixon, UFSC-GKC Scholarship Chairperson  
925 Grand Boulevard  
Kansas City, Missouri 64198-0001

**SCHOLARSHIP APPLICATION – Submitted by Dallas**

**URBAN FINANCIAL SERVICES COALITION – DALLAS  
(UFSC DALLAS)**

P.O. Box 226991, DALLAS, TEXAS 75222

(214) 233-3932 Phone/Fax

[www.ufscdallas.org](http://www.ufscdallas.org)

**SCHOLARSHIP APPLICATION**

**PERSONAL DATA**

*Name*

Last \_\_\_\_\_ First \_\_\_\_\_ MI \_\_\_\_\_

*Address*

Street \_\_\_\_\_ Apt # \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Email Address \_\_\_\_\_ Contact Number \_\_\_\_\_

**EDUCATION DATA**

High School Name \_\_\_\_\_

*Address*

Street \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Anticipated Graduation Date: \_\_\_\_\_

Acceptance at College/University? Yes or No (Circle One)

College/University Applied to \_\_\_\_\_

Career Goal \_\_\_\_\_

Intended College Major \_\_\_\_\_

GPA:

Senior Year of High School \_\_\_\_\_

Junior Year of High School \_\_\_\_\_

Current GPA: \_\_\_\_\_

Student Signature \_\_\_\_\_

Date \_\_\_\_\_

Parent/Guardian Signature \_\_\_\_\_

Phone Number \_\_\_\_\_

High School Counselor \_\_\_\_\_

Phone Number \_\_\_\_\_

High School Principal \_\_\_\_\_

Phone Number \_\_\_\_\_

**ATTACHMENTS TO BE INCLUDED WITH YOUR APPLICATION**

Verification Letter of Acceptance to College/University

Three (3) Letters of Recommendation from High School Counselor, Major Studies Teacher,  
Non-related Advisor, etc.

Transcripts from Junior and Senior Year

Essay on “My Career Goals: How the UFSC Dallas Scholarship Will Help Me to Attain Them”  
(Essay Maximum of 2 typed pages)

**MAIL COMPLETE SCHOLARSHIP APPLICATION PACKAGE TO:**

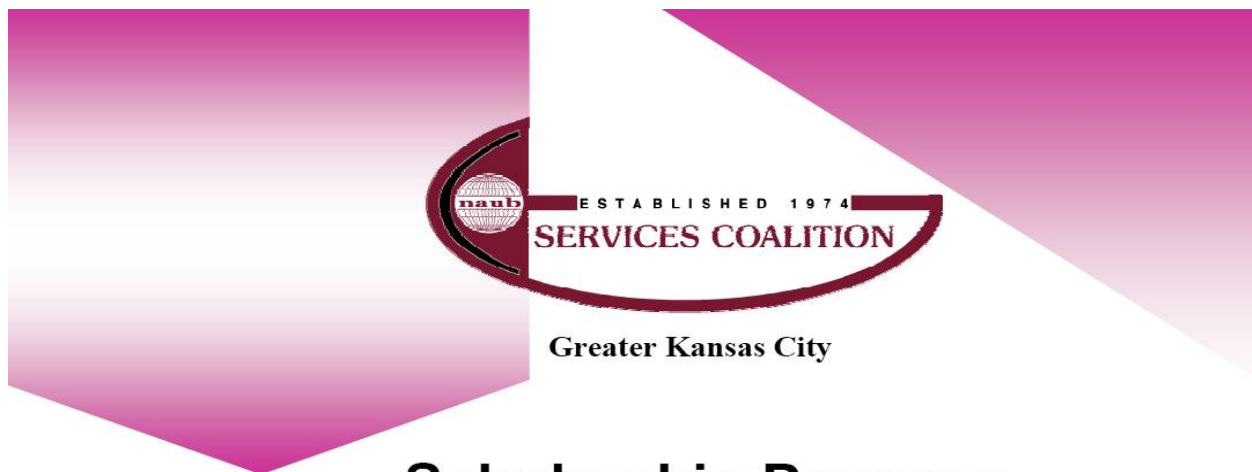
UFSC Dallas

P.O. Box 226991

Dallas, Texas 75222

ATTN: Rosie Fayson, UFSC Dallas Scholarship Chair

## SCHOLARSHIP FLYER – Submitted by Greater Kansas City



# Scholarship Program



### Eligibility Requirements

Junior and Senior College Students Who:

- Are employed or are interested in a career in the financial services industry;
- Are strong in the areas of academics, community service, and leadership; and
- Are able to effectively communicate about a topic related to the financial services industry.

Interested and qualified persons are asked to complete and submit an online application, along with an official transcript, to the address listed below by the end of the second week in October.

**Urban Financial Services Coalition - Greater Kansas City Board of Directors**  
**P.O. Box 414194**  
**Kansas City, MO 64141-4194**

The Board of Directors will prescreen applicants via telephone during the first two weeks of November. Selected applicants will be invited to meet with the Board of Directors during the Thanksgiving Holiday to make an oral presentation on their pre-selected topics. The presentations should include handouts and other visuals, and should not exceed 20 minutes in length. First, second, and third place winners will be awarded scholarships in the amounts of \$2,500, \$1,500, and \$1,000, respectively.

Please visit [www.ufsckanascity.com](http://www.ufsckanascity.com) for more details about the scholarship and the online application.



## **CONDITIONS FOR RECEIVING SCHOLARSHIP – Submitted by Dallas**

### **CONDITIONS FOR RECEIVING THE SCHOLARSHIP**

1. Scholarship will only be awarded to qualified applicants who are seeking to earn a degree or career in the financial services industry.
2. UFSC Dallas scholarship awards are to be used towards college expenses during the four-year university or 2-year college term. Once the scholarship is depleted, no more funds will be issued.
3. UFSC Dallas will issue the scholarship funds to a college account designated for the use of the scholarship recipient only. No funds will be issued directly to the scholarship recipient.
4. Funds can only be used to pay for college room and boards, books, lab fees, classroom fees, entry fees and school supplies purchased through the college.
5. Scholarship Recipient must show proof of college acceptance and enrollment date before scholarship funds will be sent to the college.
6. UFSC Dallas reserves the right to contact the college to verify student's current enrollment before issuing scholarship funds.
7. Fax, email or call for scholarship advance by contacting:

Urban Financial Services Coalition – Dallas  
P.O. Box 226991  
Dallas, Texas 75222  
214-233-3932  
214-233-3932 fax  
[emailus@ufscdallas.org](mailto:emailus@ufscdallas.org)  
ATTN: Scholarships



## Sponsorship Information

### SPONSORSHIP LEVELS – Submitted by Greater Kansas City

#### Greater Kansas City Corporate Sponsorship Levels

| <b>Sponsorship Level</b>  | <b>Gold Level<br/>\$5,000</b> | <b>Silver Level<br/>\$2,500</b>    | <b>Bronze Level<br/>\$1,000</b>    | <b>Program/Event Sponsor Level<br/>\$ Varies</b> | <b>Individual Level<br/>\$150</b> |
|---|-------------------------------|------------------------------------|------------------------------------|--|-----------------------------------|
| <b>Annual Memberships</b>   | 10                            | 5                                  | 2                                  | 0  | 1                                 |
| <b>Invitations to Programs and Special Events</b>                           | ✓<br>(no cost for members)    | ✓<br>(discounted cost for members) | ✓<br>(discounted cost for members) | ✓<br>(cost for attendees)                        | ✓<br>(discounted cost)            |
| <b>Invitations to Holiday Reception</b>                                     | ✓                             | ✓                                  | ✓                                  | ✓  | One per member                    |
| <b>Honored as UFSC-GKC Corporate Partner at Holiday Reception</b>           | Award                         | Plaque                             | Certificate                        | Honorable Mention                                |                                   |
| <b>Marketing Opportunities:</b>   |                               |                                    |                                    |  |                                   |
| Corporate Logo and Link on UFSC-GKC Website                                 | ✓                             | ✓                                  | ✓                                  |  |                                   |
| Display of Corporate Logo at Programs and Special Events                    | ✓                             | ✓                                  | ✓                                  |  |                                   |
| Job Postings on UFSC-GKC Website  | Unlimited<br>✓                | Unlimited<br>✓                     | Unlimited<br>✓                     |  |                                   |
| Opportunity to Address UFSC-GKC Constituency at Programs and Special Events |                               |                                    |                                    | ✓  |                                   |

## SPONSORSHIP LEVELS – Submitted by Dallas

2007/2008

### UFSC Dallas Corporate Partnership Sponsor Levels

Your contribution may qualify under the Community Reinvestment Act

**\$25,000 Title Partnership**

\$2,500 in Scholarships given in the name of Title Sponsor  
Unlimited recognition as Title Sponsor on all event Brochures and Programs  
Recognition and signage at all programs and events  
Partnerships for joint community activities  
Forty (40) employee memberships

**\$15,000 Diamond Partnership**

\$2,000 in Scholarships given in the name of Diamond Sponsor  
Recognition as Diamond Sponsor on all event Brochures and Programs  
Recognition and signage at all programs and events  
Partnerships for joint community activities  
Thirty (30) employee memberships

**\$10,000 Platinum Partnership**

\$1,500 in Scholarships given in the name of Platinum Sponsor  
Recognition as Platinum Sponsor on all event Brochures and Programs  
Recognition and signage at all programs and events  
Partnerships for joint community activities  
Twenty (20) employee memberships

**\$5,000 Gold Partnership**

\$1,000 in Scholarships given in the name of Gold Sponsor  
Recognition as Gold Sponsor on all event Brochures and Programs  
Recognition and signage at all programs and events  
Partnerships for joint community activities  
Ten (10) employee memberships

**\$2,500 Silver Partnership**

\$500 in Scholarships given in the name of Silver Sponsor  
Recognition as Silver Sponsor on all event Brochures and Programs  
Recognition and signage at all programs and events  
Partnerships for joint community activities  
Five (5) employee memberships

**\$1,000 Bronze Partnership**

\$250 in Scholarships given in the name of Bronze Sponsor  
Recognition as Bronze Sponsor on all event Brochures and Programs  
Recognition and signage at all programs and events  
Partnerships for joint community activities  
Two (2) employee memberships

Please Make Checks Payable to:

NAUB DALLAS, INC  
ATTN: GILBERT GERST, TREASURER  
P.O. BOX 226991  
DALLAS, TEXAS 75222

## Survey Information

## WORKSHOP SURVEY – Submitted by Dallas

## Workshop Survey

Name of the workshop: \_\_\_\_\_

Please evaluate this workshop. Fill in the corresponding circle next to the number that best describes your opinion.

1 = strongly disagree   2 = somewhat disagree   3 = neither agree nor disagree

**4** = somewhat agree    **5** = agree

The workshop met the stated objectives: 1 o    2 o    3 o  
 4 o    5 o

I learned something valuable that I didn't know and can use in my everyday life: **1 o** **2 o** **3 o**  
**4 o** **5 o**

The speaker was clear, interesting and easy to understand:

|     |     |     |   |
|-----|-----|-----|---|
| 1 o | 2 o | 3 o | 4 |
| o   | 5 o |     |   |

I would like to see this speaker return:

|                       |                       |                       |                       |                       |
|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 4                     | 5                     | 1                     | 2                     | 3                     |

I would recommend this workshop to others:


|                       |                       |                       |                       |
|-----------------------|-----------------------|-----------------------|-----------------------|
| <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 4 o                   | 5 o                   | 1 o                   | 2 o 3 o               |

## Travel Information

TRAVEL INTINERARY – Submitted by Dallas

**(NAME)**

### Airline Information (One-Way or Two-Way)

| U.S AIRWAYS<br><i>Fly with us.</i>   |                  | Travel Confirmation |        |        |         |
|--|------------------|---------------------|--------|--------|---------|
|  |                  |                     |        |        |         |
| <b>Travel Confirmation:</b>  |                  |                     |        |        |         |
| <b>CONFIRMATION</b>  |                  |                     |        |        |         |
| Date Issued  |                  |                     |        |        |         |
|  |                  |                     |        |        |         |
|  |                  |                     |        |        |         |
| <b>Passenger Information</b>   |                  |                     |        |        |         |
| Party of 1   | Dividend Miles # | Ticket #            | Seat # |        |         |
|  |                  |                     |        |        |         |
| <b>Flight Itinerary</b>  |                  |                     |        |        |         |
| Depart   | Flight #         | From                | To     | Arrive | Details |

|                         |   |                         |                       |
|-------------------------|---|-------------------------|-----------------------|
| 07:05 AM<br>Sat, Feb 23 | 1831 DFW/DALLAS-FT. WORTH, TX<br>To Be Determined | 10:30 AM<br>Sat, Feb 23 | Meal:<br>Class: Coach |
| 11:30 AM<br>Sat, Feb 23 |   | 01:28 PM<br>Sat, Feb 23 | Meal:<br>Class: Coach |

## Hotel Information

### Renaissance Dallas Hotel



Reservation for \_\_\_\_\_

- **Confirmation Number:**
- **Check-in:**
- **Check-out:**

2222 Stemmons Freeway,  
Dallas, Texas 75207 USA

**Dear**

We are pleased to confirm your reservation with Renaissance Hotels and Resorts. Below is a summary of your booking and room information. Enjoy your stay at Renaissance--delightfully, dependably unique. Let Renaissance entertain you.

- **Confirmation Number:**
- **Your hotel:** Renaissance Dallas Hotel
- **Check-in:**
- **Check-out:**
- **Room type:** 1 King or 2 Queen
- **Number of rooms:** 1
- **Guests per room:** 1
- **Guest name:**
- **Reservation confirmed:** Thursday, February 14, 2008 (03:43:00 GMT)
- **Guarantee method:** Credit card guarantee, Visa

**Special request(s):**

- •1 King Bed, Guaranteed
- •Extra Towels, Request Noted
- •Extra Feather Pillows, Request Noted
- •High Floor Room, Request Noted

### Schedule Information

➤ **Thursday, February 21, 2008**

- Arrive at DFW Airport at 2:00 pm
- Check into Renaissance Hotel (17 miles from airport)
- Leave Hotel for \_\_\_\_\_ at 4:30 pm (13 miles from hotel)
- Arrive at \_\_\_\_\_ by between 5:30 & 5:45 pm
- Security Guard should direct you the \_\_\_\_\_ on the left side of the \_\_\_\_\_
- Workshop to begin between 6:15 – 6:30 pm
- Leave \_\_\_\_\_ for Hotel between 8:00 – 8:30 pm

➤ **Friday, February 22, 2008**

- Leave Hotel for Lunch @ \_\_\_\_\_ at 11:30 am (6 miles from hotel)

- Arrive at \_\_\_\_\_ @ noon
  - Meet with UFSC Dallas Members, \_\_\_\_\_  
(tentative)
  - Leave \_\_\_\_\_ between 1:30 & 2:00 pm
  - Arrive at Hotel at 2:30 pm
  - Leave Hotel for Home of \_\_\_\_\_ at 5:30 pm (16 miles)
  - Arrive at \_\_\_\_\_ between 6:00 and 6:30 pm
  - Leave event at 9:00 pm
- **Saturday, February 23, 2008**
- Leave Hotel for Airport between 4:45 and 5:00 am
  - Flight leaves at 7:05 am
  - Arrive in \_\_\_\_\_ at 1:28 pm

## Directions

**FROM AIRPORT TO HOTEL**

**FROM HOTEL TO \_\_\_\_\_**

**(PRINT MAPQUEST DIRECTION HERE)**

# BRANDING & MARKETING

What brands instantly come to mind when you crave a soft drink, shop for sneakers or cheer for your favorite sport team. If you said Coke™, Nike™ or the Lakers it because these brands have been etched into mind and often their brand names are interchangeable with the items itself. Some companies are so successful in marketing their brand image that just the mention of the brand name tells you what the product is. The American Marketing Association ([www.marketingpower.com](http://www.marketingpower.com)) defines brand image as “the perception of a brand in the minds of persons. The brand image is a mirror reflection of the brand personality or product being. It is what people believe about a brand--their thoughts, feelings, expectations”.

The key to branding the UFSC or Urban Financial Services Coalition name is to consistently use it in our marketing and advertising, tag all our outgoing communications with our official logo, wear clothing tagged with our logo when hosting public events and brand our financial literacy programs. The UFSC National Board have taken steps to make it easier for Chapters to purchase official UFSC merchandise from our approved national merchandise marketing supplier **Already Gear** ([www.alreadygear.com](http://www.alreadygear.com)).

**Already Gear** has priced the most commonly ordered UFSC merchandise and apparel at a cost competitive with most wholesale and retail outlets. **Already Gear** specializes in a wide range of promotional products and provides a large selection of quality products that fit our budget. The strong relationships they have built with their manufacturers enable them to provide us with superior service while expediting your orders in a timely and efficient manner. **Already Gear** backs up every product with unrivaled customer support and the latest imprint technology. Our **Already Gear** Representative is:



Myra Morris

[myra@alreadygear.com](mailto:myra@alreadygear.com)

214-333-0180

214-331-5373 fax





6960 Marvin D Love Frwy, Suite B-6  
 Dallas, TX 75237  
 (214) 333-0180 ph / (214) 331-5373 fax  
 Email myra@alreadygear.com  
 www.alreadygear.com

## UFSC National Pricing

effective 3/1/2007

### MINIMUM

| QUANTITY   | UNIT PRICE | SET-UP | ITEM       | DESCRIPTION                                    | QUANTITY | UNIT PRICE |
|--|------------|--------|------------|--|----------|------------|
| 100  | \$2.20     | 45     | P-B        | Pens   | 500      | \$1.10     |
| 50   | \$31.00    | 0      | 2 1/2      | 2 1/2 Layer Custom Throw                       | 500      | \$26.00    |
| 50   | \$7.45     | 40     | OGR7065    | Personal Organizer Suncap                      | 500      | \$4.35     |
| 100  | \$1.79     | 45     | T-467      | Paper Clip Ball                                | 500      | \$1.59     |
| 72   | \$3.39     | 50     | S-131      | 15oz Stainless Steel Mug                       | 504      | \$2.79     |
| 200  | \$2.30     | 45     | MP8        | Mouse Pads                                     | 500      | \$1.95     |
| 72   | \$1.95     | 37     | CM2000C    | Ceramic Cups White                             | 500      | \$1.10     |
| 72   | \$2.55     | 37     | CM2000C    | Ceramic Cups Burgundy                          | 500      | \$1.95     |
| 100  | \$2.10     | 37     | CAPT100    | Personal Tin Logo Candle                       | 500      | \$1.70     |
| 50   | \$2.35     | 25     | DCM-CODE   | Deluxe Calculator                              | 500      | \$2.10     |
| 50   | \$6.50     | 25     | 8090 8210  | One Color Embroidered Caps w/Logo              | 500      | \$4.25     |
| 50   | \$7.50     | 25     | 8213       | Two-tone Color Embroidered Caps w/Logo         | 500      | \$6.00     |
| 250  | \$2.50     | 50     | AP908      | Bookmarkers (gold platted metal)               | 500      | \$2.20     |
| 250  | \$0.69     | 45     | K1114      | Ruler Letter openers                           | 500      | \$0.65     |
| 100  | \$24.00    | 65     |            | Beverage Napkins                               | 500      | \$180.00   |
| 1  | \$179.00   | 80     | 109002     | Table Skirts                                   | -        | -          |
| 1  | \$74.00    | 45     | 102001     | Table Runner with one color imprint            | -        | -          |
| 100  | \$2.49     | 50     | L103W      | Lanyards                                       | 500      | \$1.80     |
| 100  | \$3.02     | 104    |            | Custom Lapel Pins                              | 500      | \$2.18     |
| 250  | \$1.35     | 45     | SPBPR      | Silicone Wristband -Printed                    | 500      | \$1.05     |
| 250  | \$2.49     | 45     | MDP-10     | Stress Balls                                   | 500      | \$2.09     |
| 25   | \$14.88    | 65     | DE         | USB Flash Drives 128MB                         | -        | -          |
| 25   | \$5.75     | 50     | Adult S-XL | White T-Shirts w/ two color imprint/one side   | 500      | \$3.75     |
| 25   | \$6.75     | 50     | Adult S-XL | Color T-Shirts w/two color imprint/one side    | 500      | \$4.75     |
| 25   | \$18.00    | 25     | Adult S-XL | Custom Sport Shirts with left chest embroidery | -        | -          |
|  |            | 25     | BDG        | Body Back Packs                                |          |            |
| <b>PLEASE NOTE: NO SET-UP CHARGES FOR 500 PIECES OR MORE</b> |            |        |            |  |          |            |

Prices DO NOT reflect shipping and handling charges. Prices subject change without notice. If you have any questions please contact your Already Gear Area Sales Manager, Myra Morris at 214-333-0180. THANK YOU FOR YOUR BUSINESS!

## **Business Cards**

Business Cards are our calling cards in our everyday work life and they also serve as a branding tool to conduct business on behalf of our Chapters. All Chapter Leaders conducting business for their Chapters should carry business cards with the UFSC logo and contact information of the Chapter. Some recommended low-cost solutions are:

**Prints Made Easy** ([www.printsmadeeasy.com](http://www.printsmadeeasy.com)) is an on-line printing service of competitively priced business cards and stationary service. Their service lets you design your own card where you can select from hundreds of templates to fit your need. Prices start at \$17.99 or 100 double-sided cards.

**Office Max** ([www.officemax.com](http://www.officemax.com)) Offers an on-line or in-store print store with business cards starting at \$23.99 for 1,000 cards.

**Bizcard** ([www.bizcard.com](http://www.bizcard.com)) uploaded design cards start at \$19.95 for 250 cards

**VistaPrint** ([www.vistaprints.com](http://www.vistaprints.com)) offers 250 free unlimited high quality full color business cards. In order to take advantage of this free offer, Vista Prints requires:

- You pay the appropriate shipping/ handling charge applied to each order.
- Vista Print's logo and tagline be printed on the back of your business card (there is a small fee to remove their logo and tagline from your free order).

All four sites have a stationary service where you can bundle and match your business cards, letterhead and envelope merchandise for a discount and save your Chapter money.

## **Website & Domain Services**

**Homestead Technologies, Inc.** ([www.homestead.com](http://www.homestead.com)) is a provider of affordable, easy-to-use tools and services that help you create an easy, low-cost website. They tap the Web to compete more effectively and win more business. Prices start at \$4.99 per month for starter website and up to \$49.99 per month for website, domain, email and traffic monitoring.

**GoDaddy** ([www.godaddy.com](http://www.godaddy.com)) is the world's largest domain name registrar. As an ICANN-accredited domain registrar, Go Daddy has more names under management than any other registrar, offers products at prices up to 70% less than the competition and has 24/7 live customer service.

**Google Apps** ([www.google.com/apps](http://www.google.com/apps)) is an easy and inexpensive way to get a custom domain and start building your business' online presence. Your domain will be automatically configured to work with Google services including Google Sites and Gmail for custom email addresses. Domain registration for one year are \$10.00.

**Active-Domain** ([www.active-domain.com](http://www.active-domain.com)) offers free with new registration:

- No setup fee, sales tax or hidden cost
- Email forwarding addresses
- Unlimited URL redirections
- URL frame/cloaking
- Sub-domains or Host Names
- 60 days of free trial web hosting (after trial period, prices start at \$8.95 per month)

**EarthLink – Website-Hosting** ([www.earthlink.net/offers/site-builder/](http://www.earthlink.net/offers/site-builder/)) website builder can be done in less than 1 hour. The FREE Website Builder is point-and-click simple. You'll get a free domain name and all the hosting features you need. The site also features:

- Free domain name for 2 years
- Free setup
- Free 24/7/365 live phone support
- No contracts or hidden fees

**Yahoo Small Business Web Hosting** ([www.webhosting.yahoo.com/ps/sb/index.php](http://www.webhosting.yahoo.com/ps/sb/index.php))

Offers low cost webhosting depending on your choice of 1-month term - \$12.95/month; 3-month term - \$8.96/month for the first 3 months, \$11.95/month after; 12-month term - \$7.46/month for the first 3 months, \$9.95/month after. One-time setup fee of \$25.00 is waived for all terms. The site also offers:

- Free, easy-to-use tools to build your web site
- Hosting of your web site
- 24-hour toll-free phone support
- Unlimited disk space, which allows you to build as many web pages as you want
- Unlimited data transfer, which allows you to support as many visitors as you want
- 1,000 business email addresses (such as [jimhanks@learn2yoga.com](mailto:jimhanks@learn2yoga.com))
- Unlimited email storage

## **Marketing Sources**

**Facebook Advertising** ([www.facebook.com/advertising](http://www.facebook.com/advertising)) offers an easy 5-Step process to setting up your advertising with prices that you control according to your budget.

**LinkedIn** ([www.linkedin.com](http://www.linkedin.com)) is an online network of more than 30 million experienced professionals from around the world, representing 150 industries. It's a great tool to keep your chapter members engaged with each other and it works as the new electronic business card for others seeking for you and your members. Its most famous **LinkedIn** member is President Barack Obama!

**Constant Contact** ([www.constantcontact.com](http://www.constantcontact.com)) is a low-cost email marketing service that allows you to set up a database of email recipients to receive email blasts and communications from your chapter. The site features hundreds of templates to customize your announcements and newsletters. Constant Contact allows you to set up your chapter's template and upload the UFSC logo and other pictures into your account where you can easily drop in news items and updates to quickly and timely send out your communication. Constant Contact offers:

- Free 60-day Trial
- No contract
- Unlimited emails to your email database
- Up to 5 images in your newsletter or email communication at no additional cost
- Automatic management of opt-ins, opt-outs and bounces
- Free unlimited customer support
- Hundreds of marketing and newsletter templates to choose from
- Pricing starting at \$15.00 per month with a 20% discount for non-profits with a 6 month prepay

**SurveyMonkey** ([www.surveymonkey.com](http://www.surveymonkey.com)) is an online survey tool that enables people of all experience levels to create their own surveys quickly and easily. SurveyMonkey gives thousands of people the feedback they need to make more informed decisions, including more than 80% of the Fortune 100. Prices start at free to \$200 per year.

**Constant Contact Surveys** ([www.constantcontact.com/survey](http://www.constantcontact.com/survey)) offers a 60-day free trial for up to 100 survey responses. After the free trial period, prices start at \$15.00.

### **Other Useful Branding Tools**

**Microsoft Templates** ([www.microsoft.com](http://www.microsoft.com)). Select "templates" on this website for free hundreds of office forms, word and excel templates to create multimedia documents.

**Animoto** ([www.animoto.com](http://www.animoto.com)) is a web application that, with the click of a button, produces videos using images and music that a user selects. Your photos from your chapter's events can be made into a video has the impact of a movie with music and visual effects.

**MuVee** ([www.muvee.com](http://www.muvee.com)) is provides the quickest and easiest way of making great-looking movies and slideshows of our chapter's events. You can mix as many video, picture and music files together as you need in 3 simple steps.

**Picasa** ([www.picasa.com](http://www.picasa.com)) is a free downloadable photo service from Google. Use this service to download chapter photos for archiving.

**INSERT  
CHAPTER DEVELOPMENT  
GUIDELINES  
HERE**



# COMMUNICATION

Communication with our Chapters is vital to the growth and camaraderie of our organization. Consistent communication, whether it is by email, newsletter, phone or meetings keep your members informed of the state of our organization.

Electronic communication is the easiest and fastest way to timely distribute information to our members. There are several no cost and low cost services available for your use.

**Constant Contact** ([www.constantcontact.com](http://www.constantcontact.com)) – see “Branding and Marketing” for information on this service.

**Evite** ([www.evite.com](http://www.evite.com)) is a free online invitations website. Evite has meeting and event planning tools to help your chapters be more successful while saving time, paper supplies and postage. Evite, allows you to set up an email database for quick distribution of your communication as well as allow you to drop in the UFSC Logo on your Evite.

Evite also features:

- A feedback report showing who opened your Evite and when
- Hundred of free invitations templates
- Budget Estimator for calculating event cost
- Event Planner checklist
- eCards for sending thank-you cards after your events

**Accessline** ([www.accessline.com](http://www.accessline.com)) is a low cost way to obtain a phone, fax, 1-800 number or conference line for our Chapters. Accessline is a full service voice mail system that instantly contacts you via an email or cell phone text message the moment you get a voice mail or fax. Callers can listen in and leave a voicemail message to a UFSC Chapter instead of members’ work voicemail. Incoming voicemail messages and or faxes are re-routed to designated member’s work or personal email. The designated UFSC members can listen to the voicemail messages or view a fax message on the computer and transfer the call via email or fax to the appropriate UFSC member. This service sets up a virtual office and allows us to conduct our Chapters more like a business. This is especially important when we are conducting business with corporate sponsors or potential members. Accessline offers:

- No contract, no term commitment
- Voicemail and fax on one number
- Instant message alert
- Storage to save your voicemail messages and fax messages up to 60 days
- Forward voicemail message and fax via email



- 24-hour Free Customer Service
- \$25.00 set-up fee with monthly local calls starting at \$8.95 plus tax per month.

**Free Conference Call** ([www.freeconferencall.com](http://www.freeconferencall.com)) is a free conference call service requiring only a name and email account to set up a conference call number for your chapter. There is no contract, no fees and no services charges. Only normal long distance charges by each caller's carrier applies. There will no bill or charges from Free Conference Call for the service. The service also includes recording of your conference call for playback.

**GoToMeeting** ([www.gotomeeting.com](http://www.gotomeeting.com)) is a web conferencing tools that allows you to meet online rather than in a conference room. It allows your chapters and its members to do more and travel less. You can try it for free with prices for the service starting at \$49.00 a month or \$468.00 a year. way to bring your members or committee together without actually meeting in one place.

# LEGAL DOCUMENTATION



## **BYLAWS OF URBAN FINANCIAL SERVICES COALITION**

Newly revised and adopted May 29, 2007

# **BYLAWS OF URBAN FINANCIAL SERVICES COALITION** **TABLE OF CONTENTS**

|  |    |
|--|----|
| ARTICLE I: Corporation .....                       | 3  |
| Section 1.1 Corporate Name .....                   | 3  |
| Section 1.2 National Office .....                  | 3  |
| Section 1.3 Objectives .....                       | 3  |
| Section 1.4 Organization and Government .....      | 3  |
| Section 1.5 Affiliate Chapters .....               | 4  |
| Section 1.6 Associate Chapters .....               | 4  |
| Section 1.7 Student Chapters .....                 | 5  |
| Section 1.8 Individual Members .....               | 5  |
| Section 1.9 Charters .....                         | 5  |
| Section 1.10 Chapters .....                        | 6  |
| Section 1.11 Revenues .....                        | 6  |
| Section 1.12 Duration .....                        | 7  |
| Section 1.13 Dissolution .....                     | 7  |
| ARTICLE II: Membership .....                       | 7  |
| Section 2.1 Eligibility .....                      | 7  |
| Section 2.2 Disciplinary Action .....              | 8  |
| ARTICLE III: Boards and Councils .....             | 9  |
| Section 3.1 The National Board of Directors .....  | 9  |
| Section 3.2 Regional Vice Presidents Council ..... | 10 |
| Section 3.3 Advisory Board .....                   | 10 |
| ARTICLE IV: Officers and Executive Director .....  | 11 |
| Section 4.1 National President .....               | 11 |
| Section 4.2 National Vice President .....          | 11 |
| Section 4.3 National Secretary .....               | 11 |
| Section 4.4 National Treasurer .....               | 12 |
| Section 4.5 Past National President .....          | 12 |
| Section 4.6 Parliamentarian .....                  | 12 |
| Section 4.7 Regional Vice Presidents .....         | 12 |
| Section 4.8 Regional Representatives .....         | 13 |
| Section 4.9 Executive Director .....               | 13 |
| Section 4.10 Election of National Officers .....   | 13 |
| Section 4.11 Regional Elections .....              | 15 |
| Section 4.12 Term of Office .....                  | 15 |
| ARTICLE V: National Conference .....               | 15 |
| Section 5.1 Annual Meeting .....                   | 15 |
| Section 5.2 Purpose .....                          | 16 |
| Section 5.3 Voting .....                           | 16 |
| Section 5.4 Quorum .....                           | 16 |
| Section 5.5 Meeting Notice .....                   | 16 |
| Section 5.6 Administration .....                   | 16 |
| ARTICLE VI: Committees .....                       | 17 |
| Section 6.1 Administrative Committees .....        | 17 |
| Section 6.2 Committee Appointments .....           | 18 |
| ARTICLE VII: Miscellaneous Provisions .....        | 18 |
| Section 7.1 Fund Disbursement .....                | 18 |
| Section 7.2 Fund Placement .....                   | 18 |
| Section 7.3 Endowment Funds .....                  | 18 |
| Section 7.4 Auditor .....                          | 18 |
| Section 7.5 Counsel .....                          | 18 |
| Section 7.6 Fiscal Year .....                      | 19 |
| Section 7.7 Gender Designation .....               | 19 |
| Section 7.8 Awards .....                           | 19 |
| Section 7.9 Insignia, Etcetera .....               | 19 |
| Section 7.10 Induction of Officers .....           | 19 |
| ARTICLE VIII: Amendments .....                     | 20 |
| Section 8.1 .....                                  | 20 |

*Newly revised and adopted May 29, 2007*

Page 2 of 20

## BYLAWS OF URBAN FINANCIAL SERVICES COALITION

### ARTICLE I: Corporation

#### **Section 1.1 Corporate Name**

The organization shall be known as *Urban Financial Services Coalition*. (Hereinafter referred to as "UFSC") with jurisdiction throughout the country over Affiliate Chapters, Associate Chapters, Student Chapters and Individual Members in cities that do not have a Chapter.

#### **Section 1.2 National Office**

The national office for the transaction of business of UFSC will be at such a place as the Board of Directors, from time to time, shall determine. If otherwise not determined, it shall be located in the District of Columbia (the "National Office").

#### **Section 1.3 Objectives**

- a) To bring together minority professionals in the financial services industry for the exchange of experiences, ideas and interests in order to help promote career and professional development;
- b) To acquaint professionals with the opportunities available in the financial services industry;
- c) To provide educational, technical and advisory assistance to the community.

#### **Section 1.4 Organization and Government**

UFSC is organized exclusively for the purpose of promoting the common interests in the financial services industry set forth above and is not organized for profit or to engage in an activity ordinarily carried on for profit.

Notwithstanding any other provisions of the Association's Articles of Incorporation and these By-Laws, UFSC shall not carry on any other activities not permitted to be carried on by a professional organization exempt from Federal Income taxation under Section 501(c)6 of the Internal Revenue Code of 1954 (or the corresponding provision of any future United States Internal Revenue Law).

- a) No part of the net earnings of UFSC shall accrue to the benefit of or be distributed to its members, trustees, officers, or other private persons, except that UFSC shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the objectives and purposes set forth above.
- b) The Laws of UFSC shall be the By-Laws and such other regulations as may be established by the National Board of Directors.
- c) The principal units of UFSC shall be The National Board of Directors, the Affiliate Chapters, the Associate Chapters, the Student Chapters, the Advisory Board, the Corporate Members and the Individual Members.
- d) The Nationally elected Officers shall be a National President, a National Vice President, a National Secretary, and a National Treasurer.
- e) The Regionally elected Officers shall be: a Regional Vice President from each Region and a Regional Representative from each Region.
- f) Other members represented at the National Level shall be the immediate Past President of UFSC who becomes the Advisory Board Chairperson; and the Parliamentarian appointed by the President of UFSC.

***Newly revised and adopted May 29, 2007***

Page 3 of 20

## BYLAWS OF URBAN FINANCIAL SERVICES COALITION

- g) The Corporate Office shall consist of the immediate Past President, the current President, the current Vice President and the Executive Director. Its mission is to assist the President in matters of governance, which have a bearing on the well being of UFSC.

### **Section 1.5 Affiliate Chapters**

- a) Any Chapter of UFSC having at least TWENTY (20) members shall be known as an Affiliate Chapter.
- b) The full name of an Affiliate Chapter shall carry the National Brand Name, *Urban Financial Services Coalition or UFSC*. In addition, each chapter is to be identified by the local geographic market designation to include the city or State under the brand name. If a chapter can not carry the national brand due to state or local jurisdiction prohibitions, the chapter may apply for a national waiver and approval of substitute name.
- c) Each Affiliate Chapter shall be a member of a Region, as determined by the National Board of Directors, and shall periodically advise it's Regional Vice President of its Chapter activities.
- d) Each Affiliate Chapter shall adopt By-Laws for its governance and shall forward a copy and all amendments thereof to the Parliamentarian. The Chapter By-Laws shall in no way conflict with the By-Laws of UFSC.
- e) Each Affiliate Chapter shall be entitled to representation at the National Conference by not more than THREE delegates who shall have a total of THREE VOTES. Said delegate representation shall be in addition to any member of the Affiliate Chapter who is an elected member of the National Board of Directors.
- f) Any Affiliate Chapter that has it's Charter revoked, due to endangering the National Organization, or failure to meet financial obligation (as outlined in ARTICLE I, Section 1.11 (b)) or failure to comply with minimum program guidelines for chapter operations **including IRS 501 (c) (6) designation** as outlined in Requirements For Chapters in Good Standing or ceases to exist, or voluntarily resigns its membership, shall forward any records that pertain to UFSC to the National Secretary within SIXTY days after notification of revocation from the National Board of Directors. Any funds remaining in the chapter treasury shall be distributed as specified in the Chapter By-Laws.
- g) A chapter shall be reinstated once it submits the requested documentation, meets its financial obligation, satisfies the requirements for a Chapter in Good Standing and has the Regional Officer present a written case of support as outlined in the Regional Officers' job duties, and is approved by the National Board of Directors. The National Secretary and Treasurer will certify that the required documentation and financial obligation have been satisfied, respectively. This certification is submitted to the National Board to reinstate the chapter by a simple majority vote.

### **Section 1.6 Associate Chapters**

- a) Any NEW CHAPTER shall carry the National Brand Name of *Urban Financial Services Coalition or UFSC* with the local geographic market designation. If chapter can not carry national brand due to state or local jurisdiction prohibitions, chapter may apply for national waiver and approval of substitute name. The new chapter shall be known as an ASSOCIATE CHAPTER and shall remain at such level for at least ONE (1) year. Upon recommendation by the Regional Vice President, and having met the application requirements established by UFSC, the Chapter may have its status changed to "Affiliate Chapter," provided a minimum of TWENTY (20) members has been attained.
- b) Any Chapter of UFSC having less than TWENTY (20) members shall be known as an ASSOCIATE CHAPTER.

*Newly revised and adopted May 29, 2007*

Page 4 of 20

## **BYLAWS OF URBAN FINANCIAL SERVICES COALITION**

- c) Each Associate Chapter shall be entitled to representation at the National Conference by ONE (1) delegate who shall have ONE (1) VOTE. Said delegate representation shall be in addition to any member of the Associate Chapter who is an elected member of the National Board of Directors.
- d) All Associate Chapters shall be subject to and governed by the provisions of ARTICLE I Section 1.5, b, c, d, f and g.
- e) An Associate Chapter that has attained the minimum number of members to become an AFFILIATE CHAPTER (20) may have its Chapter Status changed upon the recommendation of the Regional Vice President and by submitting its roster of members in good financial standing to the National Secretary. This roster must be received a minimum of THIRTYDAYS prior to the delegates meeting of the National Conference.

### **Section 1.7 Student Chapters**

- a) Any NEW CHAPTER shall carry the National Brand Name of *Urban Financial Services Coalition* or *UFSC* with the local geographic market designation. If chapter can not carry national brand due to state or local jurisdiction prohibitions, chapter may apply for national waiver and approval of substitute name. The new chapter shall be known as a STUDENT CHAPTER.
- b) All Student Chapters shall be subject to and governed by the provisions of ARTICLE I Section 1.5, b, c, d, f and g.

### **Section 1.8 Individual Members**

- a) The National Vice President shall approve the representation when requested to do so and forward the information to the National Secretary THIRTY DAYS prior to the delegates meeting of the National Conference.
- b) The ONE VOTE shall be cast by the National Vice President at all other business meetings of the National Board of Directors.

### **Section 1.9 Charters**

- a) The National Board of Directors shall have the authority to issue/revoke Charters for Corporate Members, National Affiliates, Affiliate, Associate and Student Chapters.
- b) Each Charter shall be under the seal of the *Urban Financial Services Coalition* or *UFSC* and shall be signed by the National President and National Secretary. If chapter can not carry national brand due to state or local jurisdiction prohibitions, chapter may apply for national waiver and approval of substitute name.
- c) New Charters can only be approved at the Annual National Conference by TWO-THIRDS vote of the National Board of Directors and the delegates of record.
- d) An AFFILIATE CHAPTER of UFSC may be established upon a group petition of at least TWENTY (20) persons who have formed a local organization, in accordance with the Section 1.5 and the following conditions:
  - 1. Completion of the Affiliation application with both the National Brand Name and local geographic market designation.
  - 2. The Application shall list the name, title, address and employer of each local chapter member; the names of the local chapter officers; and a brief history of the local chapter.
  - 3. The original application and five (5) copies shall be forwarded in typewritten form to the Regional Vice President for approval who shall in turn forward a copy to each member of the National Board of Directors.

*Newly revised and adopted May 29, 2007*

Page 5 of 20



## BYLAWS OF URBAN FINANCIAL SERVICES COALITION

4. Obtain written letter of recommendation from respective Regional Vice President, certifying that Chapter as having successfully completed a minimum of one year of operation as an Associate Chapter and/or has met minimum membership requirements for Affiliate Chapter status.
- e) A REFUNDABLE Application Fee in accordance with ARTICLE I, Section 1.11 (f) shall accompany each application.
- f) An ASSOCIATE CHAPTER of UFSC may be established upon a group petition of at least TEN (10) persons who have formed a local organization, in accordance with Section 1.6 and adherence to Section 1.9, d and e.
- g) A STUDENT CHAPTER of UFSC may be established upon a group petition of at least TEN (10) persons who have formed a student organization as outline in the Student Chapter Guidelines and in accordance with ARTICLE I, Section 1.7 and adherence to Section 1.9, d and e.
- h) A chapter shall have its charter revoked upon failure to meet financial obligation (as outlined in ARTICLE I, Section 1.11 (b)) and/or failure to comply with minimum program guidelines for chapter operations **including IRS 501 (c) (6) designation** as outlined in Requirements For Chapters in Good Standing upon advisement of Regional Vice President, and affirmed by the National Board of Directors.
- i) A chapter, whose charter has been revoked for a period exceeding ONE year, shall be required to complete the process for initial membership (as an Interest Group) as outlined in the Chapter Formation Guidelines.

### Section 1.10 Chapters

- a) Each Affiliate and Associate Chapter in their respective regions shall have the opportunity to host a Regional Conference under the guidance of the Regional Officers. The Regional Conference shall be a one to three day conference modeled after the National Conference as described in ARTICLE V.
- b) Each Affiliate, Associate and Student Chapter shall maintain under proper security, a Charter issued by the National Board of Directors, TWO (2) copies of the By-Laws of UFSC, ONE (1) copy of its own laws of government and all other regulations and publications by the Affiliate or Associate Chapters.
- c) The individual chapters in their respective regions shall have the power, by a TWO-THIRDS affirmative vote, to remove any Regional Vice President or Regional Representative for malfeasance in office; neglect of duty; and offense against the By-Laws of UFSC or any act that tarnishes the dignity of UFSC. The individual chapters shall submit their request together with the reason(s) for removal of its Regional Officer(s) to the National Board of Directors for its ratification. Ratification by the National Board shall be by a TWO-THIRDS affirmative vote.

### Section 1.11 Revenues

- a) The National Board of Directors shall determine annual UFSC assessments (dues) for Individual Members, Affiliate and Associate Chapters. Such assessments shall be remitted to the National Treasurer on or before the payment date approved by the National Board of Directors and shall be based on rosters or applications submitted to the National Secretary as of December 31<sup>st</sup> of the prior year or 60 days prior to the payment date.
- b) Any Individual Member, Affiliate or Associate Chapter that shall fail to remit its annual dues to the National Treasurer on or before the payment date annually will be assessed a late fee, as determined by the National Board of Directors. In the event that the delinquency continues beyond 90 days, the delinquent individual shall have his/her membership suspended immediately and the Affiliate or Associate Chapter shall have its charter revoked.

*Newly revised and adopted May 29, 2007*

Page 6 of 20



## **BYLAWS OF URBAN FINANCIAL SERVICES COALITION**

- c) Any revision in the annual assessment shall be effective in the fiscal year following the National Conference at which such revision was legislated unless otherwise prescribed by the National Board of Directors.
- d) All Affiliate and Associate Chapters shall submit its local chapter membership roster to the National Secretary by May 31<sup>st</sup> and December 31<sup>st</sup> annually. The membership roster shall contain the names of all Chapter members; their banks or employers; their mailing addresses; and appropriate designation identifying all local Chapter Officers.
- e) The National Board of Directors shall determine annual UFSC assessments for Student Chapters, Corporate Members and National Affiliates. Such assessments shall be due when invoiced. Any revision of the assessment shall be effective on the date of renewal of membership following the National Conference when such revision was legislated unless otherwise provided by the National Board of Directors.
- f) The Membership Application Fee shall be a set amount established by the National Board of Directors and shall be paid by the prospective member at the time membership is requested in UFSC. Said Application Fee shall be refundable if the individual is not accepted for membership.

### **Section 1.12 Duration**

UFSC shall have perpetual existence, unless dissolved as hereinafter provided.

### **Section 1.13 Dissolution**

UFSC may be dissolved by resolution concurred in by THREE-FOURTHS of the delegates and the National Board of Directors present and voting at the National Conference or any regularly called special meeting of the membership of UFSC provided, however, that notice of such meeting shall be published in a newspaper or general circulation in the City of Boston, Massachusetts, two (2) times not less than ten (10) days prior to such meeting, and further provided, that a certificate of such dissolution signed by the last President of UFSC shall be filed in the office of the Secretary of State of Massachusetts and in the office of the Clark County Clerk.

Upon the dissolution of UFSC, the National Board of Directors shall, after paying or making provision for the payment of all the liabilities of the corporation, dispose of all the assets of UFSC exclusively for the purpose and objectives of UFSC in such manner, or to such organization or organizations organized and operated exclusively for charitable, educational, religious, or scientific purposes as shall at the time qualify as an exempt organization or organizations under Section 501 (c) 6 of the Internal Revenue Service Code of 1954 (or the corresponding provision of any future United States Internal Revenue Service Code), as the Board of Directors shall determine. Any such assets not so disposed of shall be disposed of by the Superior Court of the county in which the principal office of UFSC is then located, exclusively for such purposes or to such organization or organizations, as said court shall determine, which are organized and operated exclusively for such purposes.

## **ARTICLE II: Membership**

### **Section 2.1 Eligibility**

- a) Membership in UFSC shall be limited to Affiliate Chapters, Associate Chapters, Student Chapters, Individual Members, Corporate Members and National Affiliates duly chartered by the National Board of Directors.
- b) Any organization comprised of Financial Services Professionals or students enrolled in the School of Business or related majors may request membership in UFSC by submitting a signed application, on

*Newly revised and adopted May 29, 2007*

Page 7 of 20

## **BYLAWS OF URBAN FINANCIAL SERVICES COALITION**

a form approved by the National Board of Directors, to the National Secretary. Said application shall be signed by the organization President and Secretary and shall be accompanied by an application fee, as determined by the National Board of Directors.

- c) Individuals employed in the Financial Services Industry, in cities where there are not enough interested and qualified persons to form an Affiliate or Associate Chapter, may request membership in UFSC by submitting a signed application, on a form approved by the National Board of Directors, to the National Secretary. The required application fee as determined by the National Board of Directors must accompany said application.
- d) Members may opt to pay a one-time fee set by the National Board of Directors and payable within a one year period to become Lifetime Members. The individual must be a member in good standing on the local or national level for a minimum of five years. Only members that are either at the Individual or Chapter membership level will be eligible to apply for Lifetime Membership. A Lifetime Member will be required to pay annual dues to its local chapter.
- e) Each application of the prospective chapter shall be reviewed by the National Board of Directors and shall require the approval of TWO-THIRDS (2/3) of the National Board of Directors and delegates, present and voting at the Annual National Conference, with the exception of the individual members who will be approved by the Member Services Committee.
- f) Each Individual Member, Affiliate and Associate Chapter shall be required to submit their annual assessments (dues), as determined by the National Board of Directors, to the National Treasurer on or before the payment date set by the National Board of Directors annually to maintain their continuing membership in UFSC.
- g) Any Financial Services Corporation or National Organization identified by an Affiliate or Associate Chapter or the National Board of Directors may request membership in UFSC by submitting a signed application, on a form approved by the National Board of Directors, to the National President with a copy to the National Secretary.
- h) Upon receipt by the National Treasurer of the required membership fee as set forth by the National Board of Directors, a Corporate Membership or a National Affiliate Charter will be issued.
- i) Corporate and National Affiliate memberships shall be classified as non-voting memberships.

### ***Section 2.2 Disciplinary Action***

- a) Any Individual Member, Affiliate, Associate or Student Chapter delinquent in the payment of its annual assessment beyond 90 days shall automatically have its membership suspended.
- b) Any Individual Member, Affiliate, Associate or Student Chapter that engages in activities that are in direct violation of the By-Laws; encourages or participates in any activity that diminishes or embarrasses the integrity of UFSC or commits any action deemed inappropriate and not in the best interest of UFSC, may have its Charter or Membership revoked.
- c) Any Individual Member suspended from UFSC and any Affiliate, Associate or Student Chapter that has its Charter revoked shall lose all its rights and privileges in UFSC.
- d) Any Individual Member of an Affiliate, Associate or Student Chapter that has had its Charter revoked, who is a National Officer, Regional Vice President, Regional Representative, or a member of a UFSC Committee shall immediately be discharged. The National Board of Directors shall fill any vacancy created by said discharge.

*Newly revised and adopted May 29, 2007*

Page 8 of 20

## **BYLAWS OF URBAN FINANCIAL SERVICES COALITION**

- e) Any Individual Member, Affiliate, Associate or Student Chapter that shall have had its membership suspended or charter revoked by the National Board of Directors may appeal such action by filing a written appeal addressed to the National Secretary within THIRTY days following the notice advising her/him of such suspension or revocation.

## **ARTICLE III: Boards and Councils**

### ***Section 3.1 The National Board of Directors***

- a) The National Board of Directors shall have the power to supervise and act upon all UFSC matters that arise between consecutive National Conferences.
- b) The National Board of Directors shall consist of the following: The National President, who shall be Chairperson; National Vice President; National Secretary; National Treasurer; Regional Vice Presidents; Regional Representatives; the Advisory Board Chairperson; and the Parliamentarian.
- c) The newly elected Regional Vice Presidents and Regional Representatives, as provided for in the By-Laws, shall have their names forwarded to the incumbent National Secretary by the incumbent Regional Vice President.
- d) A MAJORITY of the members of the National Board shall constitute a quorum at the National Conference and at any regular business meeting held between the National Conference.
- e) The National Board of Directors shall have the power, by MAJORITY vote, to fill any vacancy caused by the death, resignation, removal of any national officer or, failure to identify a qualified candidate. In the case of the vacancy of the National President, the vacancy will be filled by the National Vice President. In the case of the vacancy of a national officer, the individual selected to fill such vacancy will be titled "Interim". If there is a vacancy of the National President, National Vice President, National Secretary or National Treasurer, the vacancy shall be filled within 60 days. Any individuals selected to fill such vacancies shall serve until a successor is elected or designated at the next meeting of the delegates.
- f) The National Board of Directors shall monitor all UFSC programs and administer field operations of UFSC between meetings of the National Conference.
- g) The National Board of Directors shall review all petitions for chartering Affiliate, Associate or Student Chapters and submit its recommendations to the delegates at the National Conference for final action.
- h) The National Board of Directors shall design and supervise the manufacture and distribution of all UFSC insignia.
- i) The National Board of Directors shall have the power to establish such procedures or regulations as are necessary for the successful conduct of business at the business meetings held between Conferences that are not in conflict with the By-Laws.
- j) The National Board of Directors shall have the power, by a THREE-FOURTHS affirmative vote, to remove any National Officer for malfeasance in office; neglect of duty; any offense against the laws of UFSC or any act that tarnishes the dignity of UFSC.
- k) The National Board of Directors shall have the power by MAJORITY vote to revoke the Charter of any Affiliate, Associate or Student Chapter according to the By-Laws of UFSC. Any Affiliate, Associate or Student Chapter shall have the right to appeal the revocation of its Charter. Following said appeal, the National Board may affirm its revocation of the Charter by a TWO-THIRD affirmative vote of its members, present and voting.

***Newly revised and adopted May 29, 2007***

Page 9 of 20

## **BYLAWS OF URBAN FINANCIAL SERVICES COALITION**

- l) The National Board of Directors shall have the power by MAJORITY vote to enter into contractual relationships and to represent UFSC in such legal matters as may arise.
- m) The National Board of Directors shall have the responsibility and authority for all National Conferences.
- n) The National Board of Directors shall hold at least ONE regular business meeting between consecutive National Conferences. The National President may call special meetings whenever dictated by urgency. All meetings shall be held at a place and time determined by the National Board of Directors.
- o) Written, electronic or printed notice stating the place, day, and hour of any meeting of the National Board of Directors shall be delivered personally, by postal or electronic mail to each delegate of record not less than ten (10) days nor more than ninety (90) days before the date of such meeting, by or at the direction of the President, the Secretary, or the officers or persons calling the meeting. In case of a special meeting or when required by the By-Laws, the purpose or purposes for which the meeting is called shall be stated in the notice. If mailed, the notice of the meeting shall be deemed to be delivered when deposited in the United States mail addressed to the delegate at his/her address as it appears on the records of UFSC, with postage thereon prepaid.
- p) At the National Conference or business meeting, a delegate entitled to a vote may vote by proxy executed in writing by the delegate or by his authorized attorney in fact. No proxy shall be valid after one (1) month from the date of its execution, unless otherwise provided in the proxy.
- q) Robert's Rules of Order, (most recent edition), shall be the authority used by the Parliamentarian for all questions of procedure at any meeting of the National Board of Directors.
- r) Each member of the National Board of Directors shall be indemnified by UFSC for any and all acts conducted by said director that is within the scope of his authority.
- s) The predecessor of all National Officers shall turn over records within 45-days following the National Conference.

### ***Section 3.2 Regional Vice Presidents Council***

- a) There shall be a Regional Vice Presidents Council comprised of the National Vice President, who shall be the Chairperson, the Regional Vice Presidents, and the Regional Representatives.
- b) The National Vice President shall be responsible for coordinating the activities of the Regional Vice Presidents and the Regional Representatives and shall report directly to the National Board of Directors.
- c) The Regional Vice Presidents Council shall meet at least ONCE annually and shall recommend to the National Board of Directors techniques for enhancing the image of UFSC and effective procedures for implementing UFSC programs in the Regions.

### ***Section 3.3 Advisory Board***

- a) There shall be an Advisory Board comprised of the Past National Presidents who shall act in an advisory capacity and report directly to the National President.
- b) The immediate Past National President shall be the chairperson of the Advisory Board and a voting member of the National Board of Directors.

*Newly revised and adopted May 29, 2007*

Page 10 of 20

## **BYLAWS OF URBAN FINANCIAL SERVICES COALITION**

- c) The Advisory Board shall meet at least TWICE annually and shall report to the National President progress on designated assignments.

## **ARTICLE IV: Officers and Executive Director**

### ***Section 4.1 National President***

- a) The National President shall be the Chief Administrative Officer of UFSC. The Chief Administrative Officer shall preside at all business sessions of the National Conference and serve as Chairperson of the National Board of Directors. The Chief Administrative Officer shall be a non-voting member at regular business meetings held between the National Conference on business matters unless there is a tie. In that case, the Chief Administrative Officer shall cast the deciding vote. The Chief Administrative Officer shall have the authority to establish and dissolve committees and appoint and discharge each Chairperson unless otherwise provided by the By-Laws. The Chief Administrative Officer shall have the authority to interpret and enforce the provisions of the By-Laws, and Regulations of UFSC, subject to review by the National Board of Directors.
- b) The National President shall sign all charters and documents issued by UFSC, instruments evidencing indebtedness by UFSC, and all contracts entered into by UFSC.
- c) The National President shall have the power to call special meetings of the National Board of Directors and the Regional Vice Presidents Committee.
- d) The National President shall represent UFSC at all public affairs, when possible and designate a member of the National Board of Directors to be present at such affairs should he/she be unable to attend.

### ***Section 4.2 National Vice President***

- a) The National Vice President shall perform the duties of the National President when the National President is absent or otherwise unable to serve.
- b) The National Vice President shall serve as Chairperson of the Regional Vice Presidents Council and perform such other duties delegated by the National President.

### ***Section 4.3 National Secretary***

- a) The National Secretary shall be responsible for the maintenance of the corporate records of UFSC. He/she shall be responsible for insuring that minutes are taken at the National Conference and the National Board of Directors meetings.
- b) The National Secretary shall countersign all Charters and documents issued by UFSC and all contracts entered into by UFSC.
- c) The National Secretary shall maintain a roster of all Individual, Corporate, Affiliate, Associate and Student Chapter members and will furnish such roster, upon request, to members of the National Board of Directors.
- d) The National Secretary shall certify the credentials of all delegates attending the National Conference.



## **BYLAWS OF URBAN FINANCIAL SERVICES COALITION**

### ***Section 4.4 National Treasurer***

- a) The National Treasurer shall be responsible for all fiscal affairs of UFSC. He/She shall be a designated signatory of all bank accounts held in the name of UFSC.
- b) The National Treasurer shall be responsible for the preparation of the fiscal year report of UFSC and shall deliver a financial report at the National Conference.
- c) The National Treasurer shall operate under the direct supervision of the National Board of Directors.
- d) The National Treasurer shall prepare the UFSC annual budget for the National Board of Directors no later than FORTY-FIVE DAYS after the budget year to which it applies has begun and, once approved by the National Board of Directors, shall monitor the fiscal affairs of UFSC.
- e) The National Treasurer shall prepare financial statements as of the close of each quarter and distribute them to each Affiliate, Associate and Student Chapter within SIXTY DAYS following the close of each quarter.
- f) The National Treasurer shall disburse UFSC funds only upon order of the National President or the National Board of Directors provided a valid invoice or receipt is submitted. An appropriate register shall be maintained by the National Treasurer, which clearly indicates the date of the disbursement; the payee and the purpose.

### ***Section 4.5 Past National President***

Each Past National President shall be an ex officio of the National Board of Directors and a member of the Advisory Board as outlined by the By-Laws.

### ***Section 4.6 Parliamentarian***

- a) There shall be a National Parliamentarian who shall be responsible for recommending interpretations and changes to the By-Laws.
- b) The Parliamentarian shall be appointed by the National President.
- c) The Parliamentarian shall be a non-voting member of the Board of Directors and shall be present at all business sessions of the National Conference and the National Board of Directors meetings.
- d) The Parliamentarian shall advise the National President and the National Board of Directors on questions of procedures using Robert's Rules of Order (most recent edition) during all business meetings.

### ***Section 4.7 Regional Vice Presidents***

- a) There shall be a Regional Vice President elected by the chapters in each Region of UFSC prior to the close of the business meeting of the National Conference as provided for in this By-Law.
- b) Each Regional Vice President shall be responsible for coordinating and supervising activities within his/her region as stated in the guidelines of Regional Officers' Duties, including a Regional Conference and/or business meeting, and shall render periodic reports to the National Vice President among which shall be an annual review of each chapter.

## **BYLAWS OF URBAN FINANCIAL SERVICES COALITION**

### ***Section 4.8 Regional Representatives***

- a) There shall be a Regional Representative elected by each Region at the same time elections are held for the Regional Vice President.
- b) The Regional Representative shall perform the duties of the Regional Vice President when the Regional Vice President is absent or otherwise unable to serve.

### ***Section 4.9 Executive Director***

- a) The Executive Director is directly responsible to the Board of Directors, but reports directly to the President, for the administration of the headquarter office and for the proper interpretation and fulfillment of the functions and duties of the position as detailed in the job description.
- b) The Executive Director advises the National President and the Board of Directors on all matters, changes, and conditions within UFSC, which relate to UFSC position or objectives.
- c) The Executive Director shall be a non-voting member of the Board of Directors and shall be present at all business sessions of the National Conference and the National Board of Directors meetings.
- d) In the absence of the National Treasurer, the Executive Director may disburse funds provided they are in compliance with ARTICLE IV, Section 4.4 (f).

### ***Section 4.10 Election of National Officers***

- a) There shall be a Nominating Committee of UFSC that shall serve prior to and during sessions of the National Conference.
- b) The Nominating Committee shall be composed of a Chairperson and at least one Representative from each Region. The President shall appoint the Chairperson. The Regional Vice President shall inform the President of the region's representative at least NINETY DAYS in advance of the National Conference.
- c) National Officers, Regional Vice Presidents, Regional Representatives, and past National Presidents shall not be eligible for membership on the Nominating Committee.
- d) The National Secretary shall publish the names and addresses of the Nominating Committee members via U.S. mail or electronic mail to all Affiliate and Associate Chapters, and all members of the National Board of Directors at least SEVENTY-FIVE DAYS prior to the National Conference.
- e) The Nominating Committee shall prepare standard ballots for use in the election process.
- f) The Nominating Committee shall prepare a standard questionnaire for use by all Chapters, Regional Vice Presidents and National Officers in presenting the qualifications of a candidate. The Nominating Committee shall consider no candidate whose qualifications are not stated in conformity with such questionnaire.
- g) No candidate shall be considered who is a member of a Student Chapter or not in good standing with a local Chapter for a minimum of two (2) consecutive years or is a member of a local Chapter whose Charter has been revoked by UFSC. An Individual Member is considered not to be in good standing if his/her current dues have not been paid for the current year. A standard document should be provided to each candidate that the chapter president or national representative, Regional officer or National Treasurer shall certify.
- h) Candidates for UFSC Offices shall file their application with the Nominating Committee at least SIXTY days prior to the National Conference.

***Newly revised and adopted May 29, 2007***

Page 13 of 20



## BYLAWS OF URBAN FINANCIAL SERVICES COALITION

- i) The candidate must have held an elected or appointed position at the local or national level. If the candidate is an Individual member, in lieu of holding a local or national position, the member would be required to attend the previous two consecutive National Conferences and three previous consecutive Board Meetings. The candidate must submit consent to nomination form, official candidate questionnaire and letter of financial support and acknowledgement from a senior officer of their place of employment. The candidate must have a working knowledge of parliamentary law and a thorough understanding of the By-Laws of UFSC.
- j) The Nominating Committee shall drop from consideration any candidate found to be ineligible for office in accordance with this ARTICLE; provided; the Chairperson shall inform the sponsor of such candidate of the reason for such action. Nothing in this By-Law shall prevent the nomination of any Candidate at the National Conference subject to the same conditions outlined in Section 4.10 G, I and L of this ARTICLE; provided further that any person nominated for National Office, from the floor, shall complete an Affirmation Certificate attesting to compliance with these provisions and any misrepresentation of a material fact, substantiated by UFSC records, shall be grounds for removal from office by the National Board of Directors should said nominee be elected to office.
- k) In the event that there are no nominees for a National Office presented to the Nominating Committee before the National Conference or from the floor during the National Conference, then the incumbent National Board of Directors shall have the power, by MAJORITY vote, to fill the vacancy until a successor is elected.
- l) The Nominating Committee, with the written consent of the candidate, shall submit the candidate's name as a nominee for office. A consent form shall be submitted if a candidate is nominated from the floor upon the acceptance of the nomination.
- m) The Chairperson of the Nominating Committee shall send a report of the nominees to the National Board of Directors at least FORTY-FIVE DAYS prior to the National Conference. The report shall include the NOMINEE FOR OFFICE CERTIFICATES and the CONSENT TO NOMINATION FORMS.
- n) The Chairperson of the Nominating Committee shall circulate the report of the Nominating Committee to all Chapters and delegates of record at least THIRTY DAYS prior to the National Conference.
- o) The Nominating Committee shall make a report placing its nominees into nomination on the SECOND DAY of the National Conference. Immediately following the report of the Nominating Committee, the floor shall be open for other nominations.
- p) Balloting for UFSC Officers shall begin immediately following the closing of all nominations and shall continue until completed.
- q) In the event of a single nominee for a National office, the presiding officer may cast a single ballot for the nominee upon closing of all nominations.
- r) Election of UFSC Officers shall be by secret ballot and require the MAJORITY vote of all delegates and members of the National Board of Directors, present and voting at the National Conference.
- s) The ballots shall be opened and the count taken privately by THREE INDIVIDUALS appointed by the National President; provided that none of the individuals are National Officers, a past National President, and a candidate for any Office or a Member of the Nominating Committee. The results of the election shall be announced by the Chairperson of the Nominating Committee.

## **BYLAWS OF URBAN FINANCIAL SERVICES COALITION**

### ***Section 4.11 Regional Elections***

- a) The election of the Regional Vice Presidents and the Regional Representatives shall take place during each Region's meeting at the National Conference, preceding the Annual Board Meeting. Candidates seeking nomination must meet criteria as outlined in Section 4.10 (i).
- b) Each Chapter in the respective Region shall cast its authorized number of votes and the incumbent Regional Officers shall cast one vote each and a winner for each position shall be the candidate who gets a simple majority of the votes.
- c) In the case of a tie, a subsequent ballot will be taken until the tie is broken (maximum of 2 additional ballots). Should a tie still exist, the incumbent National Officers and the Advisory Board Chairperson shall cast one vote each.
- d) All voting shall be by secret ballot.
- e) In the event of a vacancy, the region will call a special meeting to appoint a successor. Any individuals selected to fill such vacancies shall serve until a successor is elected or designated at the next meeting of the delegates. In the event both offices are vacant, the National Vice President will call the special meeting for the region to appoint successors. The successor is subject to the same conditions outlined in Section 4.10 G, I and L of this ARTICLE IV. The Nomination Committee shall attest compliance with these provisions and any misrepresentation of a material fact, substantiated by UFSC records, shall be grounds for removal from office by the National Board of Directors.

### ***Section 4.12 Term of Office***

- a) The National President shall be elected at the National Conference and shall serve for a term of two years. He shall assume office at the September Board of Directors meeting.
- b) The National Vice President shall be elected at the National Conference and shall serve for a term of one year. He shall assume office at the September Board of Directors meeting.
- c) The National Secretary shall be elected at the National Conference and shall serve for a term of one year. He shall assume office at the September Board of Directors meeting.
- d) The National Treasurer shall be elected at the National Conference and shall serve for a term of two years. He shall assume office at the September Board of Directors meeting.
- e) The Regional Vice Presidents shall be elected at the National Conference and shall serve for a term of one year. They shall assume office at the September Board of Directors meeting. No officer shall serve more than two (2) consecutive terms in the same office.
- f) The Regional Representatives shall be elected at the National Conference and shall serve for a term of one year. They shall assume office at the September Board of Directors meeting. No officer shall serve more than two (2) consecutive terms in the same office.

## **ARTICLE V: National Conference**

### ***Section 5.1 Annual Meeting***

There shall be a National Conference of members held annually.

*Newly revised and adopted May 29, 2007*

Page 15 of 20

## **BYLAWS OF URBAN FINANCIAL SERVICES COALITION**

### **Section 5.2 Purpose**

- a) The purpose of the National Conference shall be: to enact uniform laws for the government of UFSC; to elect and define the duties of National Officers; to determine the conditions of initial and continuing membership; to issue and withdraw charters from Affiliates, Associate and Student Chapters; and to perform such other duties specifically required by the By-Laws.
- b) Legislation approved at the National Conference or the regular business meetings, which is permanent in character, shall be called The By-Laws of UFSC.

### **Section 5.3 Voting**

- a) Each National Officer, Regional Vice President, Regional Representative, and Advisory Board Chairperson shall have the right to ONE VOTE at the National Conference.
- b) Each Affiliate Chapter shall have the right of representation by no more than THREE delegates and shall have the right to THREE VOTES at the National Conference as follows: a SINGLE delegate, THREE VOTES; each of TWO delegates ONE AND ONE HALF VOTES; and each of THREE delegates, ONE VOTE.
- c) Each Associate Chapter shall have the right of representation by ONE delegate and shall have the right to ONE VOTE at the National Conference.
- d) Individual Members having attained a minimum number of fifteen (15) members and approved by the National Vice President shall have the right of representation by ONE delegate and shall have the right to ONE VOTE at the National Conference or Business meeting.
- e) Each affiliate or associate chapter shall have the right to representation by proxy; provided that only a Regional Officer shall vote the proxy of more than one Affiliate or Associate Chapter.
- f) Any delegate not present during roll call shall lose voting rights during the session for which the roll call was administered.

### **Section 5.4 Quorum**

The presence of ONE-THIRD of the delegates shall constitute a quorum for conducting business at any session of the National Conference or regular business meeting, which amplifies the By-Laws.

### **Section 5.5 Meeting Notice**

Written, electronic or printed notice stating the place, day, and hour of the National Conference shall be delivered either personally or by mail to each delegate of record not less than ten (10) days nor more than ninety (90) days before the date of such meeting, by or at the direction of the President, the Secretary or the officers or persons calling the meeting. In case of a special meeting of delegates or when required by the By-Laws, the purpose or purposes for which the meeting is called shall be stated in the notice. If mailed, the notice of the meeting shall be deemed to be delivered when deposited in the United States mail addressed to the delegate at his/her address as it appears on the records of UFSC with postage thereon prepaid.

### **Section 5.6 Administration**

- a) UFSC shall be wholly financed by membership dues, corporate partnerships, the national conference, other nationally sanctioned revenue generating activities and support of industry related programs from UFSC Foundation 501c3 funding in accordance with the By-Laws and National Board of Directors Regulations.

***Newly revised and adopted May 29, 2007***

Page 16 of 20

## BYLAWS OF URBAN FINANCIAL SERVICES COALITION

- b) Each Affiliate and Associate Chapter shall have the opportunity to bid for the National Conference site. The site shall be determined by MAJORITY vote of the National Board of Directors present and voting at the appropriate intervening business meeting no later than one year prior to the subject Conference.
- c) The National Board of Directors shall have the power by a TWO-THIRDS MAJORITY vote of its members to change the site of a National Conference, should it deem such a change in the best interest of the National Association, provided at least NINETY DAYS notice is given to all Affiliate and Associate Chapters.
- d) The National Board of Directors shall have the power by a TWO-THIRD-MAJORITY vote of its members to suspend any National Conference for any reason(s) deemed unfavorable to such National Conference.
- e) The National Board of Directors shall initiate and maintain procedures for accrediting delegates to the National Conference.
- f) The National Board of Directors shall have the responsibility for planning and supervising all plans incident to each National Conference.
- g) The principal report at the National Conference shall be titled "THE STATE OF UFSC" and shall be delivered by the National President. Said report shall be delivered at the First Session of each National Conference.
- h) "THE STATE OF UFSC" shall be published and distributed to all delegates and members of the National Board of Directors attending the National Conference.
- i) The seminar segment and any other activities at the National Conference shall be the responsibility of the Host Chapter, subject to approval by the National Board of Directors. If no host chapter exists in the city designated for the conference or if the city's chapter does not agree to be the host chapter, this becomes the responsibility of the National Conference Committee.
- j) No later than NINETY DAYS following the close of each National Conference, the Immediate Past President/Advisory Board Chairman shall issue a report on the National Conference to all Affiliate, Associate and Student Chapters including, but not limited to the financial status, attendance and highlights of the National Conference.

## ARTICLE VI: Committees

### **Section 6.1 Administrative Committees**

Administrative or standing committees may be designated by a resolution adopted by a majority of the National Board of Directors. The Chairperson of said committee should be appointed by the National President within THIRTY DAYS following the National Conference. The Chairperson shall not be an elected National Officer nor a member of any other committee provided for by the By-Laws.

Standing Committees will consist of the following:

- Member Services
- Chapter Development
- Finance
- Professional Development
- Community Development
- Technology
- Legislative Affairs
- Student Alliances

*Newly revised and adopted May 29, 2007*

Page 17 of 20

## **BYLAWS OF URBAN FINANCIAL SERVICES COALITION**

- Nominations

### ***Section 6.2 Committee Appointments***

The Committee Chairpersons and the Regional Vice Presidents shall appoint members to each committee subject to the approval of the National Board of Directors.

## **ARTICLE VII: Miscellaneous Provisions**

### ***Section 7.1 Fund Disbursement***

- a) The following persons may be the Designated Signatories for accounts maintained by UFSC: National President; National Vice President; National Secretary; National Treasurer and the Executive Director.
- b) All disbursements shall require the signature of two of the Designated Signatories. Any disbursements to a Designated Signatory must be countersigned by two other Designated Signatories.
- c) Nothing in this By-Law shall require a designated Signatory to disburse UFSC funds where the Signatory deems such payment contrary to the By-Laws or not in the best interest of UFSC. If any signatory disburses funds that are not in accordance with the By-Laws or not in the best interest of UFSC, signing authority shall be revoked by the Board of Directors.

### ***Section 7.2 Fund Placement***

- a) UFSC funds shall be placed in a commercial bank, a savings bank or savings and loan association provided each institution is insured by the Federal Deposit Insurance Corporation or Federal Savings and Loan Corporation.
- b) UFSC funds may be invested in money market instruments and such other instruments approved by the National Board of Directors.

### ***Section 7.3 Endowment Funds***

- a) An Endowment Fund may be maintained and administered by UFSC for the acceptance and expenditure of gifts or contributions for specific purposes.
- b) It shall be the responsibility of the National Board of Directors to safeguard these funds and to expand monies in strict accordance with the bequests or gifts from which it derives

### ***Section 7.4 Auditor***

- a) There shall be an independent Certified Public Accountant ("CPA") appointed by the National Board of Directors who shall be responsible for auditing the books and records of UFSC annually.
- b) The CPA may be paid a fee as determined by the National Board of Directors.

### ***Section 7.5 Counsel***

- a) There shall be Corporate Counsel appointed by the National Board of Directors who shall be responsible for reviewing all contracts, interpreting the governing documents of UFSC, and representing UFSC in all legal matters.
- b) Corporate Counsel may be paid a fee as determined by the National Board of Directors.

***Newly revised and adopted May 29, 2007***

Page 18 of 20



## BYLAWS OF URBAN FINANCIAL SERVICES COALITION

### ***Section 7.6 Fiscal Year***

The Fiscal year of UFSC shall begin on January 1st and end on December 31st of the same calendar year.

### ***Section 7.7 Gender Designation***

Any reference to the masculine gender in the By-Laws shall be for grammatical purposes only and shall not preclude any woman from holding a National Office.

### ***Section 7.8 Awards***

- a) UFSC awards program shall recognize the following awards:
  - i. The Outstanding Chapter Award
  - ii. The Robert J. Samuels Award
  - iii. The Association Award
  - iv. Lifetime Achievement Award
  - v. Outstanding Regional officer
  - vi. Most Inspired Chapter (one per region)
  - vii. Corporate Award
- b) All awards shall be administered by an Awards Committee, which is a sub-committee of National Chapter Development.
- c) Consideration for all awards shall be made in accordance with the published standards and procedures as approved by the National Board of Directors and distributed to all Affiliate and Associate Chapters.
- d) The Awards shall be presented by the National President to the awardees at the ensuing National Conference.

### ***Section 7.9 Insignia, Etcetera***

- a) All Insignia of UFSC shall be subject to approval by the National Board of Directors.
- b) The National Board of Directors shall supervise the manufacturer and distribution of Insignia of UFSC.

### ***Section 7.10 Induction of Officers***

- a) The National Officers, the Regional Vice Presidents, and the Regional Representatives of UFSC shall receive the oath of office, preferably by the immediate Past National President, prior to the close of each National Conference.
- b) All Officers for induction into office shall repeat the following oath with proper interpolations:

“I (each inductee shall state his name), in the presence of all assembled, do solemnly affirm that I will faithfully execute the office of (each inductee shall state his office), and will to the best of my ability, preserve, protect and defend the By-Laws and other Regulations of UFSC.”
- c) Following the Oath, the administrator may charge the officers with their individual and joint responsibility for just, efficient and progressive administration.

*Newly revised and adopted May 29, 2007*

Page 19 of 20

## BYLAWS OF URBAN FINANCIAL SERVICES COALITION

### ARTICLE VIII: Amendments

#### ***Section 8.1***

- a) The By-Laws of UFSC may be amended by a TWO-THIRDS vote of the delegates, and National Officers, present and voting at the National Conference or a regularly scheduled business meeting, provided the proposed Amendment shall have been submitted in writing to the National Board of Directors at least NINETY DAYS prior to the National Conference or a regularly scheduled business meeting, and provided further it shall have been circulated at least FORTY-FIVE DAYS prior to the National Conference or a regularly scheduled business meeting to all Affiliate Chapters, Associate Chapters, Regional Vice Officers and National Officers.
- b) Any Amendment to the By-Laws shall be in full force and effect on and after the date of its passage unless otherwise provided.
- c) Notice of adopted changes to the By-Laws shall be made available to all Members in Good Standing as soon as practicable but no later than ninety (90) days after the effective date.





# SPONSORSHIP/FUNDRAISING

## What Does Your Sponsorship Package Look Like?

Are you producing a sponsorship package that best represents what your chapter is doing in your community? Are you clearly communicating the need for the type of services your chapter provides? Are you highlighting your signature programs to potential sponsors and detailing specific funding needs? Here are some tips and questions to ask yourself *before* you mail your sponsorship request:

1. Does your Sponsorship package identify a specific program for funding that clearly defines it is a “financial literacy program”, “directed to the education of youth”, “provides information to senior citizens” or highlight your chapter’s signatures program?
2. Does your Sponsorship Package include a copy of your 501(c)3?
3. Does it have your chapter’s latest financials including a current 990?
4. Does it contain your Chapter’s Mission Statement and a list of your Chapter accomplishments?
5. Does it contain a list of your Directors?
6. Does is contain proof that the recipients of your services are in LMI areas?
7. Does it contain a slick graphic of pictures with subtitles highlighting your event?
8. Does is contain thank you letters or recommendation letters from other joint partners or sponsors?
9. Does it contain a grid of Sponsorship Levels?
10. Is your copied data clear and streak-free?
11. Finally, did you package all your information in attractive presentation folder that is color coordinated?

## Sample Sponsorship Letter (Potential Sponsor)

Dear Sponsor:

The \_\_\_\_\_ Chapter of the Urban Financial Services Coalition (UFSC \_\_\_\_\_) is requesting your financial support for programs and activities that benefit inner city youth, college students and urban neighborhoods and communities. Through our 501(c)3 non-profit entity UFSC \_\_\_\_\_, an organization of minority professionals in the financial services industry has a mission to “provide professional development programs, support educational advancement and promote economic empowerment for its members and minority/urban communities”. UFSC \_\_\_\_\_ is an affiliate of the national Urban Financial Services Coalition, which has over 21 chapters throughout the United States and Canada.

UFSC members bring considerable expertise, experience and knowledge of financial services and products to underserved communities. Our members and volunteers are actively engaged in providing and promoting the following programs and activities:

- Financial Literacy Workshops
- Financial Awareness Information Sessions for Senior Citizens
- Professional Development Seminars
- Scholarships for High School Seniors and College Students
- Community Services Initiatives
- Mentoring Programs for Youth and Young Adults

Our \_\_\_\_\_ Program is our Mentoring Program (give a brief description of your chapter’s signature program). (Finish with a belief statement such as this) *We believe that continuous encouragement of our students in the early grades to get a college education will increase the likelihood of them attending.*

If you have any questions or need more information about our exciting programs, please contact our Chapter President, \_\_\_\_\_ at \_\_\_\_\_. Thank you for your consideration, we look forward to your support.

Sincerely,

Chapter President

## Sample Partnership Letter (Current Sponsor/Partner)

Dear Partner:

As a Partner with Urban Financial Services Coalition - \_\_\_\_\_ (UFSC \_\_\_\_\_), we are pleased to provide you information about our mentoring program, \_\_\_\_\_.

Since 1978, UFSC \_\_\_\_\_ has provided financial literacy for community groups and individuals in low-to-moderate income areas and professional development for those seeking to advance their career within the financial service industry. The \_\_\_\_\_ is our mentorship program (**give a brief description of your chapter's signature program**)..

Some statistics about the students and their parents in the program:

- All the students live in a low-to-moderate (LMI) area in \_\_\_\_\_. A 2005 U.S. Census Data report shows that the... (**provide data to show proof of low-to-moderate income stats**).
- Over \_\_\_\_% of our students/families receive of public assistance whether it through the lunch program at their school or outside public assistance.
- Many of our students live in a single parent household.

\_\_\_\_\_’s continued commitment to UFSC \_\_\_\_\_ and the \_\_\_\_\_ Program will help ensure that these students attend college and give back to their community. Thank you for your support both now and in the future. If you have any questions, please contact our President \_\_\_\_\_ at \_\_\_\_\_.

Sincerely,

Chapter President



# UFSC COMMUNICATION & NATIONAL INFORMATION