

SECTION I-A
THE CLASS PRESIDENT

Getting Started as a New President

A Princeton alumni class succeeds (or doesn't) for many reasons, but one of the major factors in making a class work is the steps the new leadership takes in its first few weeks.

It is almost axiomatic that a new class administration under the leadership of the President needs to get off to a fast start. This objective is complicated by the fact that the vast majority of Presidents (and other officers) are announced during major Reunions in June, when everyone's attention is directed at less serious matters. Their terms of office officially begin on July 1st. Yet the summer doldrums from July through Labor Day dictate that fast and effective starts must occur between Reunions and July 15th. Accordingly, many of the following steps need to be taken **by July 15th** in order to get started without losing critical momentum.

- ➡ TIP: Hit the ground running DURING Reunions. Go to the “Best Practices” training session on Saturday morning. Spend some time with your predecessor(s) to understand your classes’ finances, ongoing projects, issues and future opportunities. Start discussing important appointments and build your team. Be sensitive to what has worked well in the past and what needs improvement. Check out your class website and see if it is up-to-date, informative and appealing.
- ➡ TIP: The Alumni Association calendar has a consistent rhythm each year. Plan ahead to maximize the impact of class actions, avoid missing deadlines:

SUMMER

- Presidents’ Letter
- First Dues Mailing
- Class Activities’ Report

SPRING

- Reunions
- AG Activities

FALL

- Tailgate/dinner
- Reunions Planning
- AG Planning

WINTER

- Alumni Day/Service of Remembrance
- Second Dues Mailing
- Reunions Planning
- AG Activities

BY JULY 15 1. During Reunions or soon thereafter, visit or call the Office of the Alumni

Association and introduce yourself to the staff members who support class activities. You should also obtain the Alumni Association's calendar of events for the next academic year.

2. Call the first meeting or conference call of the new class officers to make decisions and take the actions outlined below.
3. Appoint the Class Agent (in consultation with the Annual Giving Office), Reunion Chair(s), Technology Chair(s)/Webmaster and Community Service Chair(s).
4. Submit a complete roster of all elected and appointed class officers to the Office of the Alumni Association and let them know if you would like a class leadership email distribution list created for you.
5. Discuss with your officers your classes' priorities and agenda for the year through the next Reunion. Your discussion should include all definite and possible class activities and a schedule of regular meetings and/or conference calls for the executive committee or board. (A good time is when people will already be on campus.)
6. Contact Mailing Services at the Alumni Council to make sure they have the correct listing of officers and their contact information for your class stationary. Make sure you have enough letterhead and envelopes in stock to be able to process mailings for the year. Write to acmail@princeton.edu or call 609-258-3243. Note: only the color logo and header are printed, not the officers. The Officer listing for the letterhead is flexible and is printed per mailing. Order stationery and envelopes if you don't have enough.
7. Decide on the first class event -- typically a tailgate before and/or a reception/dinner after a the Harvard or Yale home football game -- and get a/the Vice President, Reunion Chair(s) or a designee working on it. Consider the pros and cons of a tailgate at Jadwin vs. a designated separate class location. Investigate classmates living in the area who might be able to host a post game dinner (paid for through a charge per head).
8. Work with the new and outgoing Treasurer to review the classes' finances. Establish a dues rate and help the Treasurer on the first class dues notice to be ready to go in the second half of July (normally included with the President's letter).

➡ **TIP:** A class has to generate positive free cash flow after paying for the *PAW* and other fixed charges in order to have resources available for special projects and the unexpected.

If you inherit a class that is behind on its payments or with a negative cash flow, get to work on this immediately. You do not want to spend your Presidency trying to balance the budget. One effective fix for many deficit classes is to create an optional “premium” dues level (2-3X the normal level) for those willing and able to assist the class. These individuals can be recognized during the year for their special contribution.

- JULY/AUGUST
1. Draft a “President’s letter” to introduce the new officers and outline your plans for the class to be sent with the first dues notice. Build in enough time to confer with your other officers before finalizing this letter.
 2. Ensure that the first dues notice and President's letter are submitted to the Office of the Alumni Association in early August, in time to qualify for the “Dues Incentive Program,” which is a cash incentive for you to mail your dues letters at certain times. They will be mailed to classmates in late August or early September. The letter and any attachments should be submitted electronically or in “camera-ready” hard copy.
 3. The Class must submit a Financial Report to the Treasurer’s office by August 15. It’s a good idea to follow up with your treasurer.

➡ **TIP:** Get your letter and dues notice in on time to qualify for the Dues Incentive Program. This deadline imposes discipline on the entire process and the “rebate” is found money for the class.

Heave a sigh of relief and wait for the leaves to turn. You can then turn to the matters outlined in the remainder of this manual, having “gotten started.

The President’s Responsibilities

The President plays the central role in the life of each class. Although many classmates take part

in the class's various activities, it is the President who serves as the primary leader, coordinator and inspiration for the class. As such, the President must be responsible for many key functions:

- Providing consistent and dedicated leadership to the class
 - Appointing and overseeing certain class officers (such as Reunion Chair and Class Agent) and class committee chairs
 - Conducting class meetings
 - Short- and long-term planning
 - Setting and following a timetable
 - Preparation of an annual report
 - Coordination with other class officers
 - Promoting communication with classmates
 - Promoting participation of classmates in class affairs
 - Communicating with the Alumni Association Office and other classes
 - Facilitating selection of and transition to new class officers.
- Leaving the class more cohesive and involved than it was when he/she took office.

The President should be fully knowledgeable about everything that is being done by or in the name of the class. Be sure to read all sections of this handbook so you are familiar with all the various components of class leadership. The Vice President(s) may share this responsibility, but the basic responsibility is the President's. This requires that you maintain consistent lines of communication with the other officers -- both individually and as a group.

- ➡ **TIP:** President Truman was famous for saying "The Buck Stops Here" in describing the duties of the U.S. President. Your responsibilities are similar at Princeton. You need to be on top of all class activities and initiatives because not only do you get to share in the glory of your classes' successes but you also have to clean up after its mistakes.

Among the first requirements for every new President should be reading the Class Constitution to understand the legal structure and operation of the class. Although it may come as a surprise - even to long-time class volunteers -- every class has a constitution that was adopted when the class graduated (although sometimes the document is missing from the files). The constitution provides for the method of selecting class officers, class governance and the like. Class structures differ. Most classes provide for the four main officers (President, Vice-President, Secretary and Treasurer) to be elected, with several appointed officers, such as Class Agent and Reunion Chairs. Some classes are governed by an executive committee of officers, while others have an elected or voluntary board of governors that has primary policy responsibility. A careful review of the constitution will answer these questions and provide a firm grounding in these formalities. If you don't have a copy of your class constitution, please check with the Office of the Alumni Association to see if they have it on file. A copy of a sample constitution is presented in the Appendix.

Guidelines for Decision Making

In most classes, administrative decisions are the President's prerogative, with the Executive Committee or Class Board participating in major policy decisions. The President usually appoints special committees and their chairs, sets dates for class activities, and determines what communications will be sent to the class, usually after discussion with the Executive Committee. There is no set practice in this area; the division of duties is largely a matter of class precedent and common sense.

It is important, however, that decisions not be made in a vacuum. All officers of the class and members of the Executive Committee need to know and feel that their input is valued. Involving them in the decision-making process can have a positive impact on their sense of worth as volunteers and can often result in better decisions in the long run.

➡ **TIP:** Each class has its own unique mixture of personalities, traditions and procedures. That being said, good governance of your class is your primary responsibility. Do this as you and your fellow officers see fit but be sensitive to what has transpired before you.

As officers of a legally established charitable organization, the President and all other officers are legally responsible for the actions taken in managing the affairs of the Class. The University does not indemnify any class officer from his/her personal liability in cases of misconduct.

Conducting Meetings

The President presides over the meetings of the entire class, as well as of the Class Board and/or Executive Committee. The President prepares the agenda, assigns time limits to discussion of each point and informs those who will attend well in advance so that proper forethought can be devoted. Meetings may be held in person or by conference call. For conference call meetings, the Alumni Association Office makes available a free conference bridge line. You can reserve this by calling or emailing any member of the Class Affairs Team. If that line is not available, we suggest you use a line provided by www.freeconference.com. Using a conference line allows the call to continue, even if members need to come on to the call late or leave early. Several classes have created listservs for their officers so that they can conduct virtual class meetings. These email discussion groups help people stay connected and can be easily set up by the Alumni Association Office, either using Princeton's list serv software or a free commercial provider, such as yahoogroups.

The most important rule in running a meeting is to start and end it on time. Stick to the agenda and the schedule; be firm in conducting the business of the meeting. One of the obvious enjoyments of participating in the planning of class activities is the fun and informality of the endeavor so be sure to build in some time for fun. Nevertheless, a happy compromise must be reached so that good-natured joking or long-winded speeches do not significantly delay the progress of the meeting and interrupt the business of the class.

Board or committee meetings are usually easier to run than whole class meetings, yet most constitutions provide that an annual class meeting must be held and that certain questions (constitutional amendments, for example) can only be decided at such general meetings. These are normally held during Reunions when the greatest number of classmates will be present. It takes a high order of planning, full cooperation from fellow officers and all the wit and skill the President can muster to carry off a successful class meeting during a festive Reunion. Still, Reunions continue to be the best time -- and in most cases the only practical time -- to attempt such meetings. Other opportunities might be on a Fall Football Weekend or Alumni Day. These gatherings should generally be regarded like stockholders' meetings, where proceedings are reported to the class and formal requirements for approval are met, but no real discussion is attempted.

- ➡ **TIP:** Discussion of a contentious issue with widely divergent points of view can quickly derail a class or committee meeting. If you see this happening, and you can delay the decision, it is sometimes a good idea to send the issue off to an ad hoc committee for review. Choose representatives from all viewpoints but also try to include as chairman a respected classmate, ideally not aligned strongly with one side or the other. You will be amazed at how often such a committee returns to the class with a thoughtful recommendation.

Short-Term Planning

The President establishes a timetable -- a permanent agenda of class activities each year. He or she should study the University and Alumni Association calendars to plan class activities. Certain activities take place at approximately the same time each year. For example, the class dues campaign takes place annually in the fall (It usually begins with a letter mailed in August or September as part of the President's letter to the class); the Annual Giving effort begins later in the fall and runs through the end of June. The President should work with the Treasurer and the Class Agent on plans for their campaigns so that scheduling issues may be resolved well in advance. It is important to coordinate these activities to make sure that, as much as possible, class dues notices and Annual Giving appeals do not conflict (or arrive the same week). The President will also want to schedule class dinners, mini-reunions, Board and committee meetings and other events for the entire year as part of the annual timetable.

With careful planning and coordination, the class can save money and increase its communications about upcoming events and other matters of interest. Letters and reports to the class sent out in the same envelope as dues notices save postage and handling costs. These mailings can -- and should -- be accompanied by a financial report, President's report, etc.

With adequate foresight and planning, the class can combine class and University functions to boost attendance and save money. If it is known in advance that the University will provide a location for a class party on a football weekend (as is traditionally done on the Harvard or Yale weekend), the class may choose that option rather than selecting a more expensive location elsewhere or a different date.

Meetings of the Executive and other class committees can be scheduled in connection with Reunions, class dinners, Alumni Association functions and other Princeton activities, such as football games. In this way, they draw upon the attendance at these University events and capitalize on the availability of University representatives and resources.

- ➡ **TIP:** Think of each year in terms of opportunities to get classmates together. Events can be established around things happening on campus, regionally or significant events in the life of a classmate. With regard to the last point, special appointments or awards conferred upon a classmate or spouse, or even personal events such as weddings, can provide a good opportunity to convene a group of classmates.

The President's Letter/Annual Report to the Class

Each year the President is expected to issue an annual report prepared in conjunction with the other class officers and project chairs. The entire previous year's activities should be capsuled and plans for the future should be announced. This is one of the main vehicles for disseminating information to every classmate and often takes the form of a "State of the Class" letter. The best time to send out the President's annual report is usually in the early fall, soon after the close of the class fiscal year. It should be included in the first class dues mailing, which is usually the first mailing the classmates receive in the academic year to maximize the impact of both. (Combining the report with the dues mailing saves money, as well.) Some classes also include a special annual newsletter from the class Secretary in this mailing, covering personal developments not previously published in the PAW—inclusion of some sort of newsletter insures that your mailing will be read.

- ➡ **TIP:** The age and composition of your class will help determine the relative importance of written, email and class website based communication. For something significant, you may want to use two or three of these media. Caution: unless your class website is password protected, if you post your President's Letter on the class website, it can be accessed by anyone through Google and other search engines.

The annual letter can be an opportunity to announce any class prizes, describe Reunions and class events and summarize the work of committees. If the class has a scholarship fund, the President can give a profile of the current recipient(s). If the class has won any interclass competition (Reunions attendance, dues paying percentages, Annual Giving dollars or participation awards), the President can use this opportunity to highlight those achievements. By the same token, the President can use the annual report to discuss challenges facing the class, such as low Annual Giving returns, Reunions deficits and/or low attendance or participation. However, in such cases, it is recommended to finish on a positive note.

Many Presidents include as many names of classmates as possible in the report, being sure to cite especially the achievements of those who have worked hard on behalf of the class.

- ➡ **TIP:** Successful Princeton classes thrive through broad classmate involvement. The President's Letter is your opportunity to thank all those who are making a difference for the class or University. Be inclusive—don't leave anyone out!

The President's letter has the effect of suggesting a sense of class unity and identity. Classmates are once again reminded that they belong to an organization that, despite its far-flung nature, still functions actively and is alive and well. Interim reports may supplement the annual report if desired.

Additional reports that the President prepares for the Office of the Alumni Association are the

Class Activity Report and the Event Reports. These are important, as they are used to determine class awards. If the information is not received from a class who would have won an award (for example, participation at an off-campus event), that award may be given to a class with less magnificent results, but who did return the report. The Activity Report is to be completed during the summer following the fiscal year. This report tracks meetings, conference calls, etc.

- ➡ **TIP:** The Event Report should be submitted after each event held. Have the event host/coordinator fill it out soon after the event while details are easily remembered.

Long-Term Planning

Many Presidents prepare a five-year plan for his or her entire administration, culminating in the next major reunion year. The plan should address the major activities that will take place over the period, allowing flexibility for changes. Some activities, such as a major reunion and a class year book, require more than one year of advance planning. Other projects that can have a multi-year mandate include establishing a class foundation or community service program. If a Class President inherits a difficult dues or Annual Giving problem, that, too, may require more than a single year of advance planning. Although a long-term plan does not have to be highly detailed or firmly adhered to in all cases, it can provide an important road map for several years to come.

- ➡ TIP: Many find it useful to focus on a short list of key issues such as:
 - Financial health of the class, dues participation, etc.
 - Improving “connectedness” in the class. This might cover improving Reunions’ attendance, staging mini-Reunions, class dinners or other special events.
 - Community Service, either periodically or on a regular basis, is a common theme for almost all Princeton classes. Choose the class Community Service Chair wisely, as a well-designed project can galvanize a class quickly.
 - Annual Giving Participation/Results

Promoting Participation

The President should encourage maximum participation in class affairs. If classmates see the same names cropping up as committee chairs or committee members year after year, they soon get the impression that a small group of classmates run the class and will continue to do so. By trying to enlist the active participation of as many classmates as possible, the President generates new ideas, new techniques and new enthusiasm. If certain problems seem to persist, the President should call for volunteers from among those who are not perennial workers.

The most direct way for the President to encourage participation by a diverse group of classmates is through appointments to committees and other groups undertaking class projects. In these appointments, the President should be mindful not only of those who have traditionally been involved in class activities, but should seek out those who might bring special skills, interests or enthusiasms to particular projects. For example, if a class is considering a tangible gift to the University, the committee could include architects, museum professionals, educators or others who could bring different perspectives to the project. And remember, many people do not get involved in class and University activities for a simple reason: they've never been asked. Many classmates would gladly participate -- indeed they would be flattered -- were they to be asked by the Class President to assume important class responsibility.

- ➡ **TIP:** A Princeton class quickly becomes a microcosm of our world, with classmates acquiring an incredibly broad range of skills and interests. Engaging these class "experts" can be a cost effective and energizing way to solve a problem or advance a cause. Sometimes you know who the "expert" is; other times you do not. As class President, you have access to the University's broadcast email system on TigerNet to communicate instantly with classmates. This can be a quick and effective way to search for knowledgeable volunteers.

The President is asked each year to select a classmate to participate in the Service of Remembrance that takes place on Alumni Day. This is a wonderful opportunity to invite a classmate to perform a very meaningful role for the class.

The more personal the contact that the President has with classmates, the better. The President should take a little extra time to add handwritten personal notes to form letters. Secretaries often send personal birthday greetings to members with good results. Treasurers have found that a personal word helps encourage dues payments, and Reunion Chairs have beefed up attendance by supplementing regular mailings with personal notes and telethons. Some Class Presidents plan meetings, phone calls and/or visits with classmates when they travel on business, thereby promoting connections with classmates for no other motivation than that they are classmates. This can help build a sense of class community, as well as encourage participation in both dues paying and Annual Giving.

Representing the Class and Staying in Touch

In addition to all of the President's functions within the class administration, the President is also the primary representative of the Class to the University. He or she should feel free to make known the views of the class board or Executive Committee to the Alumni Association volunteers and staff and the members of the University administration.

It is also a good idea for the President to initiate contact with other class presidents. There are many terrific ideas out there that can be gleaned by periodic conversations with counterparts in other classes. There can also be joint projects that classes can undertake with related classes. One of the best places to speak with other class presidents and officers is at the Alumni Association's Leadership Assembly -- a convocation held every second or third year, usually in conjunction with the home Harvard or Yale football game or Alumni Day. The assembly contains workshops specifically created for this purpose. Contact information for class leaders is available by doing a leadership search on TigerNet.

The Class President is automatically a member of the Alumni Council (formerly the "Council of Presidents"). The Alumni Council is responsible for electing the Executive Committee and convenes once or twice each year -- when there is a Leadership Assembly and at the Annual Awards Luncheon on Friday of Reunions. The Executive Committee is comprised of elected class and regional officers, committee chairs and other elected and appointed members. It meets three times each year. As Class President, you may have an opportunity to represent your class and class affairs on the Executive Committee.

The Class President will have a liaison on the Class Affairs Committee, a committee comprised of class officers (many of whom are Executive Committee or Alumni Association Members) and *ex officio* members (such as Alumni Association and PAW staff members). The CAC liaison can be of great assistance and can also serve as a sounding board for new ideas.

- TIP: Look and listen for evidence as to how other classes operate. You will be amazed at the great ideas and best practices you pick up.

Turnover of Officers

The Class Constitution outlines the requirements and procedures for selection of new class officers once the term of the current members expire. Most terms officially begin and end with the fiscal year (July 1 - June 30); however, common practice for some classes has been for the new officers to begin their terms immediately after Reunions. The President should make sure that the class election process is begun far enough in advance so that there is sufficient time allowed for identifying and nominating candidates, conducting the actual elections and notifying candidates, the class and the Office of the Alumni Association of the results. Some classes have begun the election process early enough to involve the new officers in managing Reunions--this transition period can be very useful!

An outgoing President may breathe a sign of relief as the term of office ends, but if the class is not to suffer, **the President must counsel the successor.** The retiring President is best qualified to brief the new one. The President should also encourage other outgoing officers to work with their successors! Sometimes it is helpful to hold a joint meeting or conference call to facilitate this. New Class Presidents should monitor whether their officers are receiving adequate “mentoring” and, if not, contact the former officers and ask for further help.

The outgoing President should turn over all records to the new President. The outgoing President or Secretary should also notify the Office of the Alumni Association of all changes in officers and key class leaders.