

IV – Regional Association Membership

Two groups of people make up all regional associations—a core of volunteer leaders and the larger membership body whom they represent and serve. This section of the handbook covers topics related to the latter group—how to define and manage membership, structure a successful dues campaign, create membership “value” and ultimately create an active, engaged community of local Princetonians.

A. *Defining Membership – Who is Included*

The membership of a Princeton regional association is made up of multiple constituencies, including undergraduate alumni, graduate alumni, current students, parents of current and former students, and surviving spouses or partners of Princeton alumni (widows and widowers) who live within the geographic boundaries of the association.

Each of these affiliations is denoted in University records. To assist you in understanding the affiliations and maintaining consistency through the use of the same codes in your own records and communications, below is a chart of common affiliation codes:

'	Undergraduate Alumnus or Student	P	Parent
*	Graduate School Alumnus	g	Grandparent
gs	Graduate School Student	K	Kin
S	Spouse	h	Honorary Classmate
W	Widow/Widower	H	Honorary Degree Holder

B. *Using Dues to Define Membership*

To fund operating expenses, many regional associations ask their alumni to pay dues. The Office of the Alumni Association encourages this practice, but also suggests caution in having the payment of dues signify membership in the regional group. The University considers all constituents in a given region to be members of the local association, so you may wish to instead employ the terms “dues-paying members” and “non-dues-paying members” when discussing those individuals who have or have not contributed financial resources to your group. Whenever possible, we encourage you to use the most inclusive language and practices possible.

C. *Structuring Membership Dues*

Dues structures can vary widely between regional associations. Some groups have a flat rate, while others offer a tiered structure, setting different rates for alumni, parents of students and/or alumni, first-year-out alumni, other young alumni, current undergraduates, alumni couples or families, “Old Guard” alumni, constituents residing more than X miles from the association’s major city, and/or non-residents. Other groups will give a special rate to “first time” dues-payers or to those constituents willing to receive all notifications by e-mail (and thus cutting down on production expenses).

The cost of dues also varies widely. Some associations have a top rate of \$25 and for others it is \$50. Some associations only collect dues when the treasury runs low, while others just ask alumni to pay what they think is appropriate and/or whatever they can. There are pros and cons to every kind of structure, but there is no right or wrong. When setting dues rates, it is advisable to answer two

questions—1) what will the market support and the target audience be willing to pay? and 2) what cumulative total of funds is needed to support association business? Within those parameters, associations can set dues structures at a level whereby the club’s efforts are sustainable without the need for the treasury to accumulate a huge surplus over time.

A few associations have a “patron” membership designation, offering special privileges for those alumni willing to pay a premium dues amount to support the association’s efforts. Other regional groups will ask local alumni to give donations to the club instead or in addition to membership dues. This frequently occurs when a club needs to fund a particular activity, such as a University scholarship for a local undergraduate, a community service project, a Princeton Prize in Race Relations Awards ceremony, etc. This model can be successful in drawing out alumni who are more likely to support specific initiatives than broadly defined club priorities.

D. Collecting Membership Dues

After setting an appropriate structure, the association can create a sensible dues collection program that can be consistently applied over time. Decide upon the period for which the dues will apply—is it annual, biannual, or “when-the-treasury-runs-low,” and does it cover a calendar year (January to December) or fiscal year (July to June)? Most active associations adopt an annual dues program that applies to the fiscal year, but given unique local circumstances, other systems may work better for you.

Here are some tips for successful dues solicitations:

- Dues solicitation can come in many forms—letters, e-mails, phone calls, etc. Regardless of method, the most important messages to communicate are how dues money will be spent and the value of dues-paying membership to the individual dues-payer (“value” is discussed in greater length in the Section IV–E).
- Dues can be requested of all Princeton constituents in the region, especially for the first solicitation. Whenever possible, subsequent solicitations should not go to those who have already paid.
- For follow-up requests, it may be most effective (in terms of time and cost) to target those alumni who have paid dues in the past, as well as those who regularly attend events and/or are involved in association activities (including the local Alumni Schools Committee). Such individuals may have simply forgotten when they last paid dues, or there could be personal issues occupying most of their time and attention. Reaching out to individuals reinforces an association’s image as a concerned community that keeps track of and cares about its members.
- Make information about becoming a dues-paying member available at all association events, and allow people to pay dues on such occasions.
- State the dues request clearly and concisely, and provide an easy-to-use response form and/or a pre-printed return envelope.
- Thank all dues payers for their past and current support—a short personal note or e-mail can go a long way toward making individuals feel engaged and appreciated.
- Deposit checks promptly to avoid creating gaps in dues-payers’ financial records.
- Some large associations offer an opportunity to renew membership halfway through the current year for the following year at a discounted rate.
- Some associations mandate that all officers and board members pay at least the minimal dues level to set a good example, then mention this 100% participation rate in their dues appeals.
- Remember that Annual Giving requests are in high gear from March to June, so regional association dues appeals at this time may confuse alumni as to what precisely they are giving funds.

- If your association has filed for non-profit status (either independently or under the University's group tax-exemption), dues payments and donations may be tax-deductible, and this can be mentioned in dues appeals. For more information about your association's legal status and guidelines about tax-deductibility of dues and other contributions, see Section VII.

E. Creating and Explaining Membership Value

An effective regional association will always strive to demonstrate how active membership (payment of dues and engagement in activities) benefits individuals, as well as the association and larger Princeton University community. To this end, communications—especially dues solicitations—can describe both the tangible and intangible value of participation.

Tangible value can be found in money saved or products received by dues-payers. For instance, event fees can be structured so that dues-paying members receive reduced pricing (possibly free). Some associations also have events open first or only to dues-paying members. An association can directly highlight how dues-payers will receive top priority for special events (for event and programming ideas, see Section VI) when dues solicitation coincides with the announcement of upcoming activities. Other associations will provide benefits to dues-payers, ranging from a printed alumni directory to a member “spotlight” in an upcoming newsletter to a free “Princeton Club of XX” magnet or scarf. For more information about the tax implications of providing goods, services, benefits or privileges in return for financial contributions, see Section VII.

Aside from promoting discounts or “free stuff,” dues appeals can also highlight the intangible purpose and perks of membership, such as the opportunity to connect back to the University through networking and socializing with local Princetonians. The membership can also be informed how dues money supports otherwise unfunded priorities (such as a reception for admitted students or club community service activities). Dues payment allows alumni to not only be part of the association's work, but also an integral part of the current and future University community.

F. The Role of Membership Chair, Sub-Chairs and Committee

In small associations, duties related to membership cultivation and dues collection are typically part of a larger set of responsibilities handled by an officer such as the president or secretary. But, as described in Section III of this handbook, many large (and even moderately-sized) associations appoint or elect a Membership Chair to organize these efforts.

Some regional associations have divided the work even further by creating a Membership Committee and/or sub-chairs (such as a Parents Chair, Young Alumni Chair, and/or Graduate Alumni Chair) to target Princetonian audiences who may not engage in association activities without additional prodding from “one of their own.” Similarly, some groups have worked with the University's affiliated alumni associations (i.e., Association of Black Princeton Alumni, Association of Latino Princeton Alumni, and/or Asian American Alumni Association of Princeton) to identify regional liaisons who reach out to these alumni populations and encourage them to become involved. These sub-chairs and liaisons may also be responsible for creating programming that specifically interests their targeted group.

It is important for associations to be aware that Princetonians within the aforementioned groups may feel like they are not truly welcome at association activities—that they are too young and the events are for “older” people; that they didn't have the full campus experience because they were at the graduate school and thus have little in common with undergraduate alumni; that parents should only come with

their undergraduates; or that they may be the only minority at the event. Having sub-membership chairs and liaisons who are sensitive to these feelings and try to assuage such fears through targeted appeals can make a huge impact in the effort to ensure the active and engaged membership in a regional association is truly representative of the local constituents' diversity.

G. What is an “Active and Engaged” Membership?

Throughout the process of dues solicitation and other attempts to engage association membership, it is important to stay positive, but also set realistic goals. No association gets everyone to participate; in fact, even the largest and most active regional groups tend to have a **dues-paying membership of only ten to fifteen percent**. If you have reached that level or above, you are doing very well!

Factors such as the local undergraduate/graduate alumni ratio, diversity levels and average age of the alumni population can significantly impact the types of events that are likely to be successful. If associations are cognizant of the alumni population demographics, they can make efforts to ensure club leadership is truly representative and programming appeals to a wide array of interests.

One way to measure whether a club is meeting this goal is to analyze the statistics of how many active and dues-paying members there are in different demographic categories compared to the total number of members within that category. For instance, if alumni who graduated between 1980 and 1990 constitute 20% of an association's total membership but only 5% of the association's dues-payers and/or event attendance, this imbalance indicates there is a significant group of alumni who do not feel engaged by and/or welcomed within the association. At this point, efforts can be undertaken to determine how to better serve that group (and thus, the overall association membership). Surveying your membership (or a smaller segment of it) to solicit ideas for programming, communication preferences, and price structures can be quite educational and help set an association's priorities for the future (see Section V-F and **Appendix K** for more information on best practices for surveys).

Today, the alumni body as a whole is much less likely to pay dues or come to events “because they should” than in the past. The most effective club leaders ensure (and are prepared to explain why) association activities are relevant to tigers of many different stripes.

