

Class Officer Training 101

July 30, 2020

The Agenda

- Alumni Engagement
- Alumni Council
- Class Affairs Committee
- Class Officer Expectations and Job Descriptions
- ❖ Volunteer Resources & TigerNet
- Class Business (Tax Exemption, Financial Reporting, Risk Management)
- Class Dues vs. Reunions Fees
- Banking
- Bylaws
- Elections
- Engaging Classmates (Virtually, Events, Community Service, Points, Partnerships)
- Honorary Members
- Awards

Did you know?

The Office of Alumni Affairs is now known as Alumni Engagement which is part of the Office of Advancement.



Meet the Class Affairs & Reunions Team Alumni Engagement



Milbrey (Mibs) Southerland
h59 h62 h66 h67 h74 h79 h84 h85 h86 h88 h89
h93 h01 h04 h06 h07 h13 K26
Director, Alumni Communities
Office: 609-258-5836
milbrey@princeton.edu



Dottie Werner
h22 h27 h30 h32 h33 h35 h36 h37 h38 h40 h41
h43 h44 h45 h46 h47 h48 h49 h50 h54 h55 h56
h58 h59 h62 h65 h71 h72 h78 h79 h84 h93
Coordinator, Class Affairs and Reunions
Office: 609-258-5451
tigerdot@princeton.edu



Cathy Phillips h93 h20
Associate Director, Class Affairs and Reunions
Office: 609-258-9573
cp14@princeton.edu



Ruby Bragg h50 h55 h59 h72 h79 h81 Alumni Mailings Coordinator Office: 609-258-3243 rubyedoo@princeton.edu



Kimberly Collins h49 h59 h89 h07 Coordinator, Reunions and Princeton Journeys Office: 609-258-5854 collins@princeton.edu

Alumni Engagement Resources & Assistance

- Alumni Mailing Services Liaison to Printing & Mailing Services
- Alumni Reporting
 - Dues Rosters
 - Address Lists & Labels
 - Special requests
- Letter review
- Event management advice
- Tax questions
- Community service advice
- Troubleshooting
- Protocol questions and issues
- Liaison to University resources

What is the Alumni Council?

The Alumni Council of Princeton University is the governing body of the Alumni Association of Princeton University.

The mission of the Alumni Council is "to engage as many alumni as possible in the ongoing life of the University in mutually beneficial ways and to support alumni initiatives that promote the goals of the University."

Princeton is Where You Are!



Rich Holland '96
President, Alumni Association
& Chair, Alumni Council



Mary Newburn '97
Vice President, Alumni Association
& Vice Chair, Alumni Council



Maria Carreras Kourepenos '85 P22 Treasurer, Alumni Council



Juan Goytia '00 Assistant Treasurer, Alumni Council

Executive Committee of the Alumni Council

Responsible for the governance of the broader Alumni Association of Princeton University and includes leaders from all of the alumni volunteer committees.

Standing Committees

- Class Affairs Committee
- Communications and Technology Committee
- Princetoniana Committee

- Princeton Schools Committee
- Committee on Regional Associations
- Committee on Reunions

Special Committees

- Committee on Awards for Service to Princeton
- Committee to Nominate Alumni Trustees
- Committee on Nominations

- The Princeton Prize in Race Relations
- Ad Hoc Committee on Recent Alumni Engagement

Alumni Council Dues

The dues your class pays to the Alumni Council support major alumni initiatives that make the Princeton alumni relationship so strong.

Major activities and committee work funded by these dues:

- o Class Affairs Committee, which supports class officers in all their efforts and provides proven best-practices;
- Reunions Committee provides support to volunteers planning and running a reunion;
- Princetoniana Committee whose mission is to share Princeton's traditions, history and lore;
- Princeton Schools Committee strives to reach as many applicants as possible;
- o Committee on Regional Associations, which provides grants to support new regional programs and outreach initiatives;
- Alumni Council's Annual Meeting and Old Guard Luncheon at Reunions;
- Annual Service of Remembrance at Alumni Day honors Princetonians who have died over the course of the year;
- Award for Service to Princeton and its reception honoring the winners during Reunions;
- Three full-page ads in the PAW communicate important initiatives to alumni.

Dues paid by classes (based on number of classmates)

- > Rate for five youngest classes is 75 cents /classmate
- > Rate for the Classes of 1956–2015 is 90 cents / classmate

Alumni Council dues rates have not changed since 1995!

Class Affairs Committee

Mission is to support class officers in building class community, provide guidance on best practices, troubleshoot issues and to serve as a liaison between classes and the University.

Works closely with the Alumni Engagement staff and class officers to provide useful resources to class leadership — including the Class Officer's Handbook, Tiger Tips, and other important resources.

Class Liaisons:

- Each class is assigned a liaison within the CAC.
- Your liaison can assist you with any specific class issues, provide fresh ideas for class engagement and can share best practices.

Meet the Class Affairs Committee























Mission/Purpose of each group

Class Officer:

To connect classmates to each other, the Class and the University

Alumni Engagement Staff:

- To encourage and support the efforts of class officers by providing assistance, advising on best practices, and facilitating the use of University services
- To serve as a liaison to the University

Class Affairs Committee:

- To enhance the support provided to class officers by serving as liaisons and mentors
- To collect and disseminate information on class affairs

Class Officer Expectations

Class' Expectations

- Promote engagement within the class and with the University
- Collect dues to fund projects and events that promote the mission of the class
- Disseminate information of interest to the class in a timely fashion
- •Submit classmate news to the *Princeton Alumni Weekly (PAW)* Notes column
- Plan events and programs to connect classmates to one another
- Class Officers should attend Reunions and class events whenever possible

University's Expectations

- •Class Officers will demonstrate leadership and serve as examples
 - Pay class dues
 - Represent the Class at Alumni Day
 - Attend Reunions
 - Participate in Annual Giving
 - Join the local Princeton Regional Association
 - Attend Class Events whenever possible
- Fiscal responsibility
- Commitment to welfare of the Class
- Communication with other class officers, the Class and the University
- Replacement of non-performing volunteers (make sure to cover this in your bylaws!)

Officer Job Descriptions

President

- Build and develop Class engagement
- oldentify and motivate others to work for the class
- Coordinate Class and officer functions, responsibilities, events, etc.
- Conduct meetings (class meetings, class executive committee meetings)
- ODevelop effective, consistent, regular communications system for class officers
- Establish a timetable of Class activities each year
- OWrite at least one letter to the Class annually in conjunction with the other class officers
- Attend Service of Remembrance at Alumni Day
- OSend appropriate thank-you letters/emails to all class members who assist with class activities and/or functions
- Handle officer appointments or replacements

Vice-President

- OAct as President in event of absence, incapacity or resignation
- Work with President on any special projects
- Develop and maintain regional network of activities
- Communicate regularly with classmates in various regions to foster idea flow
- Coordinate activities with regional clubs and associations
- Communicate regularly with other Class officers
- Attend all Class and Class Executive Committee meetings

Secretary

- Prepare Class newsletters, social media posts, and other communication
- OWrite all *Princeton Alumni Weekly (PAW)* Class Notes columns (ensuring a broad cross-section of information is presented)
- OWrite PAW Class Memorials and confer with parents/family on behalf of Class
- Attend all Class and Class Executive Committee meetings
- Maintain records and minutes of all Class-related meetings
- Notify Alumni Records of address changes and deaths

Treasurer

- OMaintain up-to-date, accurate records
- Send 2-3 dues solicitations annually
- Attempt to collect on back dues
- Deposit checks and pay bills promptly
- Report to University and Class annually on financial condition of Class
- Monitor criteria for tax-exempt status
- OPrudently invest unused cash balances
- Attend all Class and Class Executive Committee meetings

Appointed Officers

Reunion Chair(s)

- Manage all details of class' reunion
- Appoint sub-committee chairs and coordinate their efforts

Regional Representatives / Regional Vice Presidents

- Coordinate and plan regional events for the Class
- Work with the local regional association to maintain a Class presence

Community Service Chair

Coordinate and plan Class community service efforts

Technology Chair / Social Media Chair

- Maintain Class web page
- Maintain social media channels
- Manage Class electronic communications, including sending broadcast emails

Class Historian

- Maintain the history of the Class, from undergraduate days to the present
- Collect historical documents and information from classmates for use by the University Archives

Class Agent

- Run five fundraising campaigns for the Class, culminating in a major campaign coinciding with the major reunion
- Assume responsibility for Class success in reaching participation and dollar goals

First Steps after assuming office

- •New officers generally take office on July 1 following a major reunion.
- •Outgoing officers should work with incoming officers to pass along important information.
- •New class officers should meet to determine strategy and goals for the next 5 years.
- Appointed officers should be determined as soon as possible.
- The President should prepare a letter to the class in August.

Class Officer Calendar

May-July	August	September	October
 New class officers take office July 1 Hold class executive committee meeting or conference call Review and update bylaws Plan schedule of activities for the year Begin strategic planning for first five years Prepare class budget Confirm all officer/board appointments Prepare first mailing to class 	 Finalize plans for fall class activities Begin off-year Reunions planning Submit first class mailing to Office of Alumni Affairs (usually by August 1 for majors and by August 15 for all others) 	 Send communication about Tiger Tailgate Hold class executive committee meeting or conference call First class mailing is sent to class Begin work on Alumni Day event Begin work on spring activities 	 Send reminder email about tailgate event, if applicable Finalize Alumni Day event Tiger Tailgate (Oct/Nov)
November	December	January	February
 Submit second class dues mailing to Office of Alumni Affairs (usually by November 1 for majors and by November 15 for all others), if applicable Finalize spring schedule Appoint class representative for Service of Remembrance Hold class executive committee meeting or conference call Second class mailing is sent to class 	 Finalize Reunions planning Send holiday greetings, if desired 	 Send mailing about Alumni Day event Send third dues mailing Hold class executive committee meeting or conference call 	 Attend Alumni Day Hold class event if desired
March	April	May	June
 Send Reunions information Send fourth dues mailing, if desired Hold class executive committee meeting or conference call 	 Finalize Reunions plans Major Reunion classes begin new officer selection process 	 Reunions Hold class executive committee meeting or conference call 	 File Reunions reports with Alumni Engagement Reexamine officer appointments Evaluate year's programming and look for ways to improve Hold class executive committee meeting or conference call

Volunteer Resources

alumni.princeton.edu/volunteer/resources

CALENDAR

ALUMNI SERVICES

NEWS

ABOUT US CONTACT US Q



Alumni Communities V Goin' Back V Learn & Travel V

Volunteer ^

Connect ~

TigerNet Services >

Home > Volunteer

Volunteer Resources

Current class, regional and Reunions volunteers can login to access information, materials and tools.



Class Volunteers

Resources include the class officers' handbook, reports, alumni mailing services info, training materials and TigerNet administrative tools.

VIEW RESOURCES

Alumni Council Committees

Awards

Volunteer Profiles

Volunteer Resources

et Volunteer Tools

Tools include Broadcast Email, for sending emails to broadcast emails to constituents, and Website CMS, for managing your club or class website.

TIGERNET VOLUNTEER TOOLS HELP **DESK & RESOURCES**



Regional Volunteers

Resources include the regional officers' handbook, forms, reporting, planning documents, policy information and printing and mailing

Volunteer Recognition

Volunteer Resources: At a Glance

Handbook

Class Officers' Handbook Class Officer Roles

Governance

Class Constitutions and Bylaws Bylaws Template Alumni Elections Information Honorary Classmates Information

Communications

Sending Email with TigerNet
Alumni Mailing Services
Princeton Alumni Weekly Dates & Rates

Events & Programming

Report Class Events

Financial Matters

Dues Incentive Program
Financial Forms and Procedures

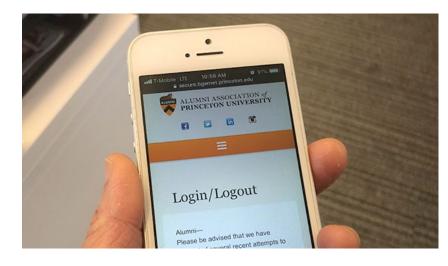
Community Service

Community Service Guidelines & Resources

TigerNet Online Community

Princeton's online alumni community and suite of volunteer tools available to all alumni.

- Alumni Directory
- My TigerNet Profile
- Alumni Email
- Discussion Groups



TigerNet Help Desk

TigerNet Online Community Help Desk	TigerNet Volunteer Tools Help Desk
For issues related to:	For issues related to:
Alumni Directory My TigerNet Profile	Broadcast Email Website Content Management
Alumni Email	
Discussion Groups Alumni News & Notes	
Contact:	Contact:
tigernet@princeton.edu⊠	alumnivolunteers@princeton.edu ⊠
609-258-1542	855-249-1829
	Monday-Friday:
	8:00 a.m 6:00 p.m. ET
	Saturday-Sunday:
	10:00 a.m. – 3:00 p.m. ET

Class Business

Group Exemption

Refer to *The Tax-Exempt Organization Handbook* posted under *Volunteer Resources*.

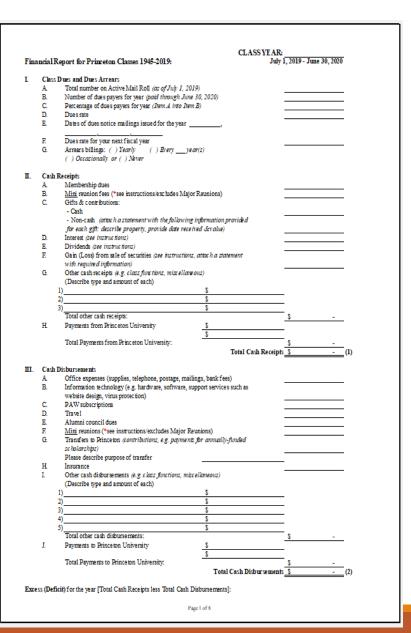
- •In 1984, Princeton obtained a group exemption letter from the IRS, enabling alumni organizations to qualify for 501(c)(3) status under its tax-exempt umbrella.
- •There are more than 150 current members, including all active classes, the APGA, most regional associations and two affiliated groups.
- Each class receives an EIN number from the IRS.

Basic Tax Exemption Rules

- •Group must be organized and operated exclusively for tax exempt (educational and charitable) purposes.
- •Must engage primarily in activities that further exempt purposes.
- No private inurement or private benefit
- •Limitations on political activity, including prohibition on intervention in political campaigns.

Financial Reporting

- University files taxes on behalf of class.
- •Class must submit financial report every year to the University Treasurer.
- •If a class does not file for 5 years, either with the University or on its own, the class is removed from the University umbrella *permanently*.
- •FY20 financial reports are due September 15, 2020.



General Advice for Officers

- Officers have a duty of loyalty to act in the best interest of the Class.
 - Do not use the tax ID number and/or tax exemption for non-charitable or personal purposes (travel tours, funds to aid members in need, etc.).
 - Personal liability Individual officers could be held legally responsible for misrepresentations, illegal actions or negligent behavior.
- •Do not *personally* sign contracts with vendors on behalf of your organization. Be clear that the person is signing as an authorized officer on behalf of the class (e.g., Jane Doe, President).
- Do not co-mingle personal money with the organization's funds.
- Always act prudently when handling the organization's funds.

Risk Management

- All Officially Related Alumni Groups and their Officers are afforded coverage under the University's Insurance programs when operating as the organization and/or during a University authorized event or program.
- Insurance Coverages Provided:
 - General Liability: Third party coverage provided when the group's actions and/or events, during an authorized University event or program, lead to injury or damage to another party.
 - Trustees and Officers Coverage for allegations of wrong doing provided to the Official Officers of the organization when acting on behalf of the organization.

Class Dues vs. Reunions Fees

Class Dues

- Class dues are tax deductible
- Class dues MAY be used for:
 - any activity or initiative that brings the class together as a whole
 - officer expenses related to the organization's activities
 - support of the Princeton Alumni Weekly
 - support of the Alumni Council (dues)
 - memorials and community service funds
 - support of scholarships/grants for Princeton students
 - payment of alumni directories

Class Dues

- Class dues MAY NOT be used for:
 - Reunions expenses
 - a classmate's Reunions fees
 - individual profit, gift, or bonus
 - support of private charitable organizations
 - political or personal gain

Class dues are NOT Annual Giving! These are often confused!

Class Dues Best Practices

- Offer the option to pay multi-year dues (e.g. \$25/year or 5 years for \$100)
- Give classmates the option to donate more if they wish
- Keep an Honor Roll
 - Example: Class of 1997
- Include dues in a points system
 - Also include other forms of engagement
 - Example: Class of 2006

Reunions Fees

- Reunions fees are NOT tax deductible
- MAY be:
 - Given or transferred to the Class Dues account
 - Used to pay for mini-reunions
 - Used to help pay fees related to the reunion for a classmate that cannot afford to attend
 - Additional accounts may be set up for classmates in need (these are not tax deductible contributions)
 - Not allowed to be funded by Class Dues
 - Best Practice: Set up a website or publicized address so classmates can donate directly and bypass all Class or Reunions funds

Reunions Fees

• MAY NOT be:

- Used for individual profit, gift, or bonus
- Used to support private charitable organizations
- Used for political or personal gain

Banking

Each class has two accounts that may not be combined:

- Class (includes class dues)
- Reunions

At least two class officers should have access to each account.

Class Bylaws

- View all class constitutions and bylaws under *Volunteer Resources*
- Constitution establishes the class
- Bylaws establish the specific rules of guidance by which the group is to function
 - ✓ Adopt bylaws if your Class does not have them
 - ✓ Template is available under *Volunteer Resources*
 - ✓ Update bylaws as necessary
- All classes should have bylaws!

Class Elections

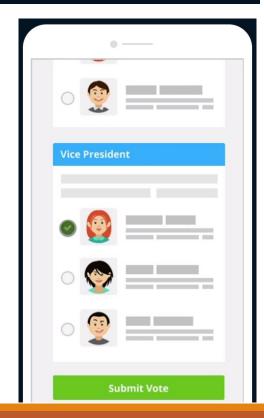
Many Princeton classes select the four core class officers (president, vice-president, secretary and treasurer) by inviting nominations and then holding elections prior to each major reunion.

The basic steps for elections are as follows:

- Call for Nominations
- Elections:
- Alumni Engagement can provide an election platform called Election Runner, free of cost to the class, to run your election.
- Results: The ballots are tabulated by your class election administrator or class elections board and typically announced during Reunions.

Elected officers begin their roles on July 1 and serve for 5 years.

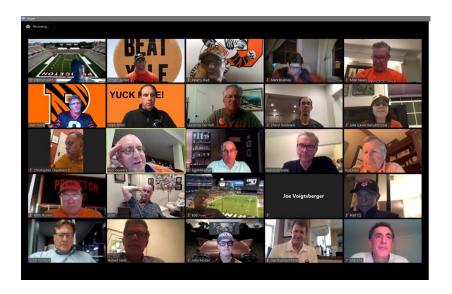




Class Engagement

Engaging Classmates Virtually

- Class panels/Fireside chats featuring classmates
- Happy Hour/Wine Tastings/Coffee Chats
- Trivia/game nights
- Book Talks
 - Princeton Pre-read
 - Feature class authors
- •Classmates teaching classmates (cooking, music, dance, exercise, etc.)



Class Events

- Regional Class Engagement
 - Appoint a network of regional representatives
 - Establish guidelines (e.g. must plan 2 events/year)
 - Work with other alumni groups in the regions





- Pre-rade
- Tiger Tailgate
- Alumni Day
- Reunions
- Princeton Journeys





Community Service

See Community Service Guidelines under Volunteer Resources



- Must relate to the organization's and Princeton's tax-exempt purposes
- Service projects must typically have in-person components that bring together members, thereby enhancing their connection to the organization and to Princeton (exceptions may be made during Covid-19)

Because of the complexity of these situations, you should seek approval from Alumni Engagement before beginning any community service effort and especially one that involves fundraising of any type.

Spotlight: Class of 2006

'06 POINTS SYSTEM

When you participate in Class of 2006 activities, you get points. The more things you do, the more points you get. What do these points get you? **Price breaks (even-cheaper-than-early-bird) on registration fees**

for our 15th Reunion!

THE DETAILS

Dues: 100 POINTS PER YEAR

They're important. They keep the class going. The more people pay dues, the more money we have for regional events and other sweet projects. You need to pay them every year by JUNE 30th. If you've already paid this year, congrats! You've received 100 of the 500 possible dues points heading to the 15th. If you haven't paid, you still have time!

Five Year Dues Payment: 600 POINTS

We gave you the option to lock in your dues rate for five years (they increase from year to year) at \$125 (\$25 per year) if you paid all your dues at once. But in case that's not enough incentive for you, we'll also give you 120 points for each of those years instead of the normal 100 points! (That's 600 points for all five years!) We've even given you the ability to pay all five years of back dues at once to get those extra points if you haven't paid in a while!

Annual Giving: 100 POINTS

We don't care what amount you give, but contribution rates are closely scrutinized (and highly rewarded) by the University. The greater percentage of us that donate, the better our class looks. Annual Giving helps the University's ranking and it makes us look so so good. Make a donation every year before June 30th and receive 100 points for each year!

PAW: 400 POINTS (+100 WITH PICTURE)

We want to know what you're up to and we want to keep our section of the PAW filled with updates and photographs. Each time you submit to the PAW, you'll receive 30 points. If you add a photo, we'll double it. You can send all your updates to our Class Secretary, Amy Sennett, at amy.sennett@gmail.com. And the best part? You can send updates and receive points as many times as you like!

Attending Reunions: 100 POINTS

If you bought a classmate wristband for any of the reunions since the fifth, we've got your name and you've got your points!

Hosting a Class Event: 800 POINTS

Help us plan a class event in your region and get tons of points. If there's a speaker or exhibit coming into town that you think a group of '06 friends would want to attend, let us know. We'll get the contact list for all the alums in your area, we'll help promote your event, and, when we've got sufficient dues money, we'll pay for transportation, food, museum tickets, etc. Any idea you've got, we're behind you to make it happen and we'll give you points for it. ReachOut 56-86-06 activities will also count. The only caveat here is that we have to pre-approve events and they must be open to all classmates in your area.

Keeping Track

We'll keep track of everyone's points and put them on a spreadsheet. You don't need to email us and let us know when you've paid dues or contributed to the PAW. We'll know those things.

Partnerships with Other Groups

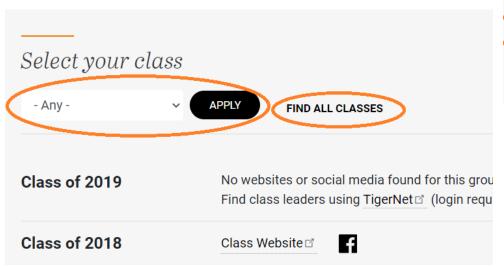
- Parent Class (25 years out) / Grandparent Class (50 years out)
- Work with other classes
- Partner with Regional Associations or Affinity Groups
- Work with other alumni groups (Ivy+)



Finding Classes & Regional Associations



Find Classes





Regional Associations



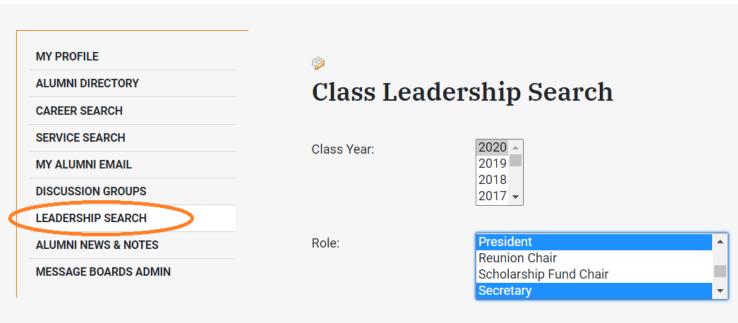
Leadership Search



TigerNet Alumni Communities Goin' Back Learn & Travel Voluntee

Home > TigerNet > Leadership Search

Leadership Search



Honorary Members

Classes may choose to recognize individuals who have made a significant contribution to their class through outstanding service, continuing commitment or demonstrated loyalty by adding them as honorary members of their class.

- Be sure to cover this and the selection process in your bylaws.
- Typical Process:
 - solicit nominations from the class
 - executive committee or the entire class votes
 - send letter to person receiving honorary membership
 - notify Alumni Engagement
- New honorary classmates are invited to participate in all class events and should be included in class mailings.

Recognition & Award Opportunities

YOUNG ALUMNI AWARD

Young Alumni Award 1932 Trophy

CLASS EVENT AWARDS

- •1898 Trophy
- •1928 Trophy

CLASS DUES AWARDS

- •1932 Plaque
- •1941 Plaque
- •1977 Plaque
- The 1942 Senior Dues Participation Award



Fun things to share with your Class

- •2020 Alumni-Faculty Forum Recordings (https://reunions.princeton.edu/aff-videos)
- •#TigersHelping (https://tigershelping.princeton.edu)
 - Be sure to check out <u>Resources!</u> (https://tigershelping.princeton.edu/resources)
- Princeton Journeys Live Lectures (https://alumni.princeton.edu/learntravel/journeys/past-live-lectures)
- Princetoniana Virtual Museum (https://www.princetonianamuseum.org)
- Reunions Costumes (https://reunions.princeton.edu/reunions-costumes)
- Princeton Zoom Backgrounds (https://reunions.princeton.edu/zoom-backgrounds)
- Guide to Zoom (https://reunions.princeton.edu/guide-to-zoom)