

Class Officer Training 101

July 20, 2022

Cathy Phillips & Dottie Werner

Alumni Engagement

Alumni Engagement is part of the Office of Advancement. Classes are one of our Alumni Communities.



Meet the Class Affairs Team



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Class Affairs Resources & Assistance

- Class reporting
 - dues rosters
 - address lists & labels
 - special requests
- Event management advice
- Tax questions
- Letter review
- Alumni Mailing Services liaison to Printing & Mailing Services
- Community service advice
- Troubleshooting
- Protocol questions and issues
- Liaison to University resources

Don't know who to contact?

Send an email to <u>classaff@princeton.edu</u>.

The Alumni Association of Princeton University



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."

Alumni Council Executive Committee Leadership



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



Monica Moore Thompson '89 Vice President, Alumni Association & Vice Chair, Alumni Council



Juan E. Goytia '00 Treasurer, Alumni Council



Adam E. Lichtenstein '95, *10 Assistant Treasurer, Alumni Council

Executive Committee of the Alumni Council

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

Standing Committees

- Class Affairs Committee (CAC)
- Communications and Technology Committee (CAT)
- Princetoniana Committee

- Committee on Regional Associations (CORA)
- Committee on Reunions (COR)
- Princeton Schools Committee (PSC)

Special & Ad Hoc Committees

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

- Ad Hoc Committee on Recent Alumni Engagement
- Ad Hoc Committee on Financial Vitality

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 1958–2016 is 90 cents / classmate

Alumni Council dues rates have not changed since 1995!

Class Affairs Committee (CAC)

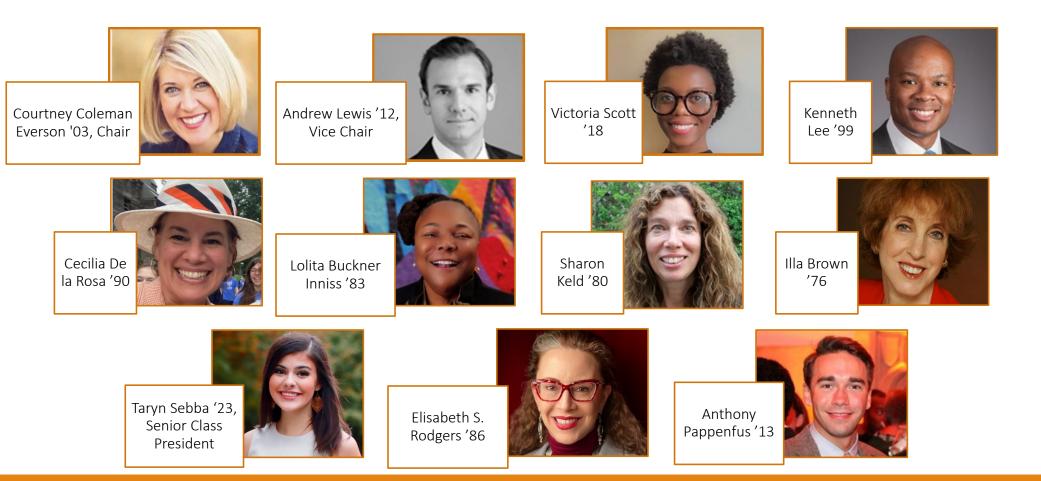
Mission is to support class officers in building class community, provide guidance on best practices, troubleshoot issues and to serve as a liaison between classes and the University.

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



Class Officer Responsibilities

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
- •Attend Reunions and class events whenever possible

University's Expectations

•Class Officers will demonstrate leadership and serve as examples

- Attend Class events whenever possible
- Represent the Class at Alumni Day
- Attend Reunions
- Pay class dues
- Participate in Annual Giving
- Participate in the local Princeton Regional Association
- •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!)

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)

• Develop effective, consistent, regular communications system for class officers

o Establish a timetable of Class activities each year

 Write at least one letter to the Class annually in conjunction with the other class officers

OAttend Service of Remembrance at Alumni Day, if possible

 Send appropriate thank-you letters/emails to all class members who assist with class activities and/or functions

oHandle 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

•Write all *Princeton Alumni Weekly* (*PAW*) Class Notes columns (ensuring a broad cross-section of information is presented)

•Write PAW Class Memorials and confer with parents/family on behalf of Class

OAttend all Class and Class Executive Committee meetings

•Maintain records and minutes of all Class-related meetings

•Notify Alumni and Donor Records of address changes and deaths

Treasurer

•Maintain up-to-date, accurate records

oSend 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

Prudently invest unused cash balances

Attend all Class and Class Executive Committee meetings



Appointed Officers

Reunion Chair(s)

- Manage all details of the Class' reunion 0
- 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

Diversity, Equity and Inclusion Chair

- Organize Class programming to forward the Class' mission of addressing systemic bias, promoting equity, and advancing inclusion 0
- Collaborate with Class officers, classmates, students, and / or the broader University community to organize regional / virtual gatherings, panels, book clubs, and / or other events 0

Community Service Chair

Coordinate and plan Class community service efforts

Technology Chair / Social Media Chair

- Build/maintain Class web page and social media channels 0
- Manage Class electronic communications, including sending broadcast emails 0

Class Historian

- Maintain the history of the Class, from undergraduate days to the present 0
- 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



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 Alumni Engagement (usually by August 1 for majors and by August 15 for all others) 	 First Year Pre-rade and Step Sing Hold class executive committee meeting or conference call First class mailing is sent to class Begin work on Class Alumni Day plans Begin work on spring activities 	 Tiger Tailgate Finalize Class Alumni Day plans
November	December	January	February
 Submit second class dues mailing to Alumni Engagement (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 Major reunion classes: inform classmates of upcoming elections and solicit nominations 	 Attend Alumni Day Hold class event, if desired
March	April	Мау	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 elections or other 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

Class Business

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.





Group Exemption

> Refer to The Tax-Exempt Organization Handbook.

- •In 1984, Princeton obtained a group exemption letter from the IRS, enabling alumni organizations to qualify for 501(c)(3) status under its taxexempt 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*.
- •FY22 financial reports are due September 15, 2022.

Fins	ncialRe	port for Princeton Classes 1945-2019:	ASS YE AR: July 1, 2019 - June 30, 2020
I	Cherr D	ues and Dues Arrears	
1.	A	Total number on Active Mail Roll (as of July 1, 2019)	
	B.	Number of dues payers for year (paid through June 30, 2020)	
	Č.	Percentage of dues payers for year (Item A into Item B)	
	D.	Dues rate	
	D. R		
	Е.	Dates of dues notice mailings issued for the year,	
	E	Dues rate for your next fisc al year	
	G.	Arrears billings: () Yearly () Every year(s)	
		() Occasionally or () Never	
-			
Π.	Cash R		
	A.	Membership dues	
	B.	Mini reunion fees (*see instructions/excludes Major Reunions)	
	С.	Gifts & contributions:	
		- Cash	
		 Non-cash (attach a statement with the following information provide d 	
		for each gift: describe property, provide date received &value)	
	D.	Interest (see instructions)	
	E.	Dividends (see instructions)	
	E	Gain (Loss) from sale of securities (see instructions, attach a statement	
		with required information)	
	G.	Other cash receipts (e.g. class flux tions, miscellane ous)	
		(Describe type and amount of each)	
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	3		
		Total other cash receipts:	s -
	н	Payments from Princeton University \$	
		Total Payments from Princeton University:	s -
			ash Receipts \$ - (1)
Ш.		is bursements	
	A.	Office expenses (supplies, telephone, postage, mailings, bank fees)	
	B.	Information technology (e.g. hardware, software, support services such as	
		website design, virus protection)	
	С.	PAW subscriptions	
	D.	Travel	
	E.	Alumni council dues	
	E	Mini reunions (*see instructions/excludes Major Reunions)	
	G.	Transfers to Princeton (contributions, e.g. payments for annually-funded	
		se holarships)	
		Please describe purpose of transfer	
	н	Insurance	
	L	Other cash disbursements (e.g. class flinctions, miscellaneous)	
		(Describe type and amount of each)	
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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 wrongdoing provided to the official officers of the organization when acting on behalf of the organization.
- \rightarrow See Class Officer Conversation under Volunteer Resources.

Class Finances

Banking

Class officers may select any bank.

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 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 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 (https://princeton97.com/honor-roll/)
- Include dues in a points system
 - Also include other forms of engagement
 - Example: Class of 2006 (https://www.princeton2006.com/06-points-system/)

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 account(s) may be set up for classmates in need (these are not tax deductible contributions)
 - Not permitted 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

Mailing Rebate Program

Alumni Engagement and the Class Affairs Committee offer a Mailing Rebate Program– formerly known as the Dues Incentive Program – to help defray the cost of paper copy mailings.

To receive the full incentive available to your class, the following requirements must be met:

- 1. Your completed **Class Annual Financial Report** must be received by the University Treasurer by **September 15, 2022**.
- Your first letter with dues request mailing must be received by Alumni Mailing Services by: August
 16 (for major reunion classes) or August 25 (for non-major reunion classes)
- Your second dues request mailing and dues ledger must be received by Alumni Mailing Services by:
 November 1 (for major reunion classes) or November 15 (for non-major reunion classes)

Rebate Award Amount:

Classes	Incentive
1951-1972	\$200
1973-1982	\$400
1983-1992	\$500
1993-2002	\$600
2003-2022	\$800

 \rightarrow Full program details will be sent with Dues Ledgers. Contact Dottie or Cathy for more information.

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 Zoom Account

- •Classes may use the Class Affairs Zoom account for class business and events that engage classmates.
- •Up to 500 people to participants in a meeting-style event.
- •The account is shared by all classes.
- •Timeslots are available on a first come, first serve basis.
- •Contact <u>classaff@princeton.edu</u> for more information.

Class Events

Regional Class Engagement

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



- University Events to coordinate with your class plans
 - Pre-rade
 - Tiger Tailgate
 - Alumni Day
 - Reunions
 - Princeton Journeys



Community Service

>See Community Service Guidelines



- 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**

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.

www.princeton2006.com/06-points-system/

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.

Relationships 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+)





Class Awards

YOUNG ALUMNI AWARD

•Young Alumni Award 1932 Trophy - For the class less than 10 years out which has had the most complete program of communication, activities and dues participation.

CLASS EVENT AWARDS

- •1898 Trophy For the largest percentage of membership attending any gathering during the year between Reunions.
- •1928 Trophy For the largest number of its members attending any gathering during the year between Reunions.

CLASS DUES AWARDS

- •1932 Plaque For the highest percentage of dues payers in a class more than 25 but less than 50 years out of Princeton.
- •1941 Plaque For the highest percentage of dues payers in a class more than one but less than 25 years out of Princeton.
- •1977 Plaque Presented to the class more than three but less than 26 years out of Princeton, reporting the largest percentage improvement in dues participation over three consecutive years.
- •The 1942 Senior Dues Participation Award Given to the class more than 50 years out of Princeton whose class roll as of the start of the fiscal year (July 1) is 100 or more and which by May 1 has attained the highest percentage of dues payers.

Submit your class events

Share your event success and qualify for a Class Award!

Visit Class Volunteer Resources to report your event.

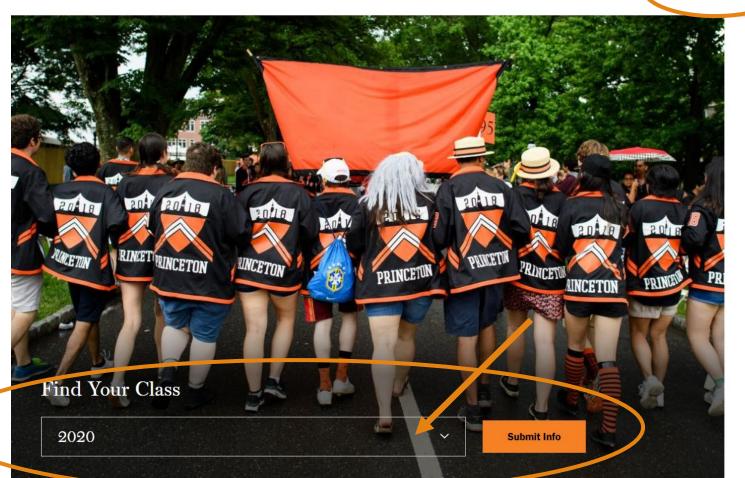
Princeton University Alumni Website

alumni.princeton.edu

Finding Class Websites

← → C ☆ 🔒 alumni.princeton.edu/our-community

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OUR COMMUNITY > CONNECT > VOLUNTEER > GI



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Find Fellow Alumn Resources on Tiger

On TigerNet, you can connect with clas alumni and friends, and locate your cla and social media channels.

alumni.princeton.edu/our-community

Finding Regional Associations + > C A alumni.princeton.edu/our-community QA PRINCETON UNIVERSITY OUR COMMUNITY ONNECT VOLUNTEER GIVE > FORWARD 12 > ALUMNI There are more than 160 Princeton regional associations around the world, so you can connect with fellow Princetonians wherever you are. Find the region closest to you. Recreation... Newton Tannersville (15) **Regional Associations Near You** Stroudsburg 80 287 Wayne 209 State

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King of

Prussia

Lansdale

76

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New Jersey

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See All

- Any -

Apply

PC of Northwestern NJ (Morristown area)

PAA of Monmouth & NE Ocean Counties

Princeton Area Alumni Association

PAA of Essex and Hudson Counties

No websites or social media found to the Find class leaders using TigerNet IP (login

alumni.princeton.edu/our-community

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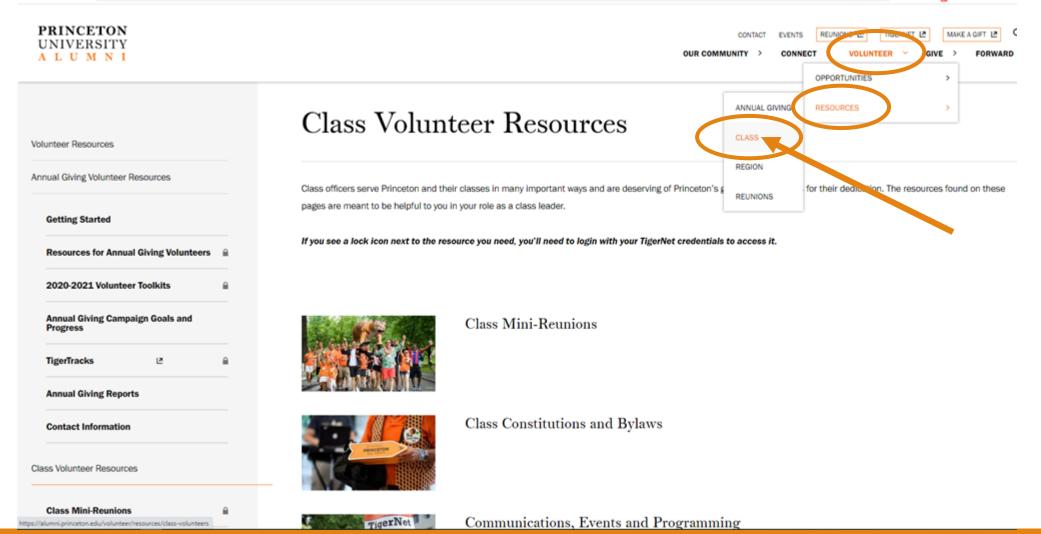
Woodbridge

Township

Volunteer Resources

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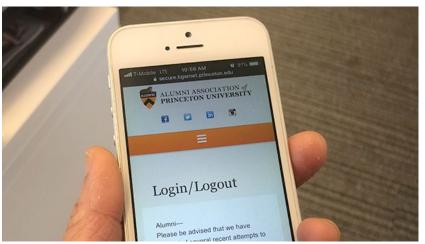


alumni.princeton.edu/volunteer/resources/class-volunteers

TigerNet Online Community

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

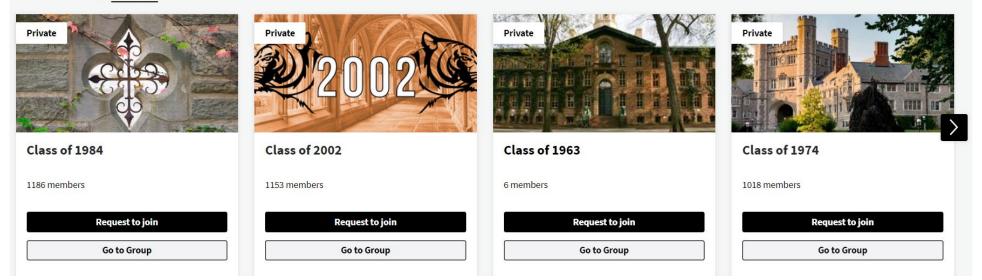
- Alumni Directory (including Leadership Search)
- My TigerNet Profile
- Alumni Email
- Discussion Groups



TigerNet 2.0

Hivebrite is replacing **iModules** as the platform for TigerNet, Princeton's online alumni community supporting group websites and broadcast email.

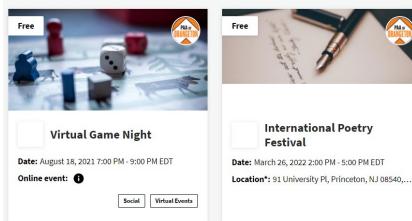
Classes (19) · See all



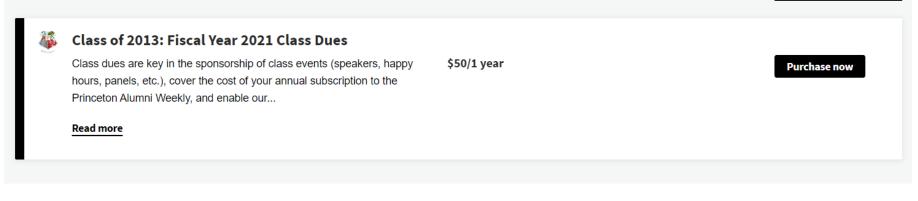
Featuring:

- Events management
- Dues management/history
- Social media integration
- New enhancements constantly rolling out...

Upcoming Events (2)



You have already purchased 3 memberships Manage your memberships



TigerNet Help Desk

alumnivolunteers@princeton.edu

(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 We look forwarding to working with you!

Tiger Cheers!

