

# Third Thursday Tiger Talk

## The Nitty-Gritty *Tips & Tricks for Club Marketing & Operations*

November 17, 2022

1:00 – 2:00 p.m. ET

*Hosted by the Committee on Regional Associations (CORA)*

*Presented by Princeton Club of Austin*



# Tips & Tricks Discussion

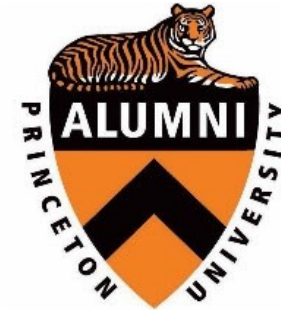
1. Marketing: Princeton connections with regional flair
2. Operational: Time savers & engagement enhancers
3. Financial: Cost savings & revenue boosters



*Hosted by the Committee on Regional Associations (CORA)  
Presented by Princeton Club of Austin*

**MARKETING**

# Princeton shield variations



# With regional flair...



*Tip: Don't have access to a graphic designer? Adobe Illustrator has a 14-day free trial (but has a learning curve... YouTube videos help!)*

# Additional creative expressions...



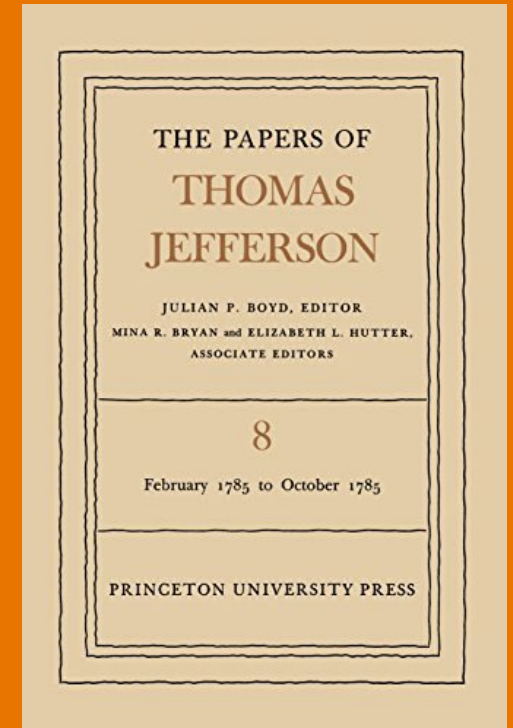
*Tip: Inkscape is a free open-source design tool (also has a learning curve... YouTube videos help!)*

# Princeton Monticello

## Princeton Official Fonts

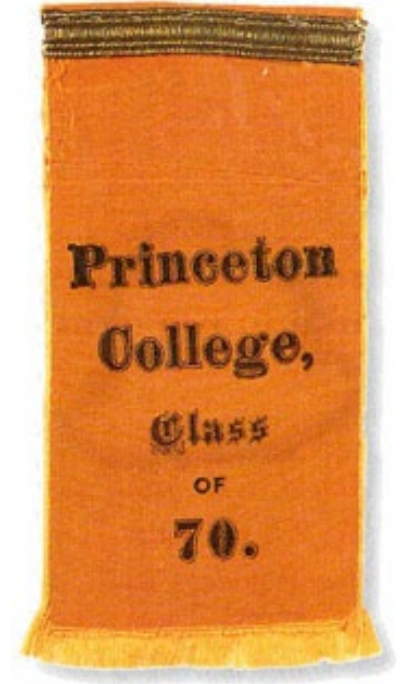
- Princeton Monticello and Franklin Gothic
- Princeton Monticello rooted in 18<sup>th</sup> century & was commissioned by Princeton University Press in 1950's
- Princeton Monticello digitized in 2003 & recommended for Headers and logo “signature lock-ups”

Franklin Gothic



# Princeton Orange

- **Pantone (PMS) 158** – closest ink match to the swatch of cloth showing the orange adopted by the trustees in 1959
- For the web (note backgrounds and font sizes)



*Class of 1870 ribbon  
From Princeton  
University Archives*



*Tip: Benjamin Moore **Startling Orange** is the closest match among major paint brands*



# Learn more...

- Princeton's Colors & Shields:

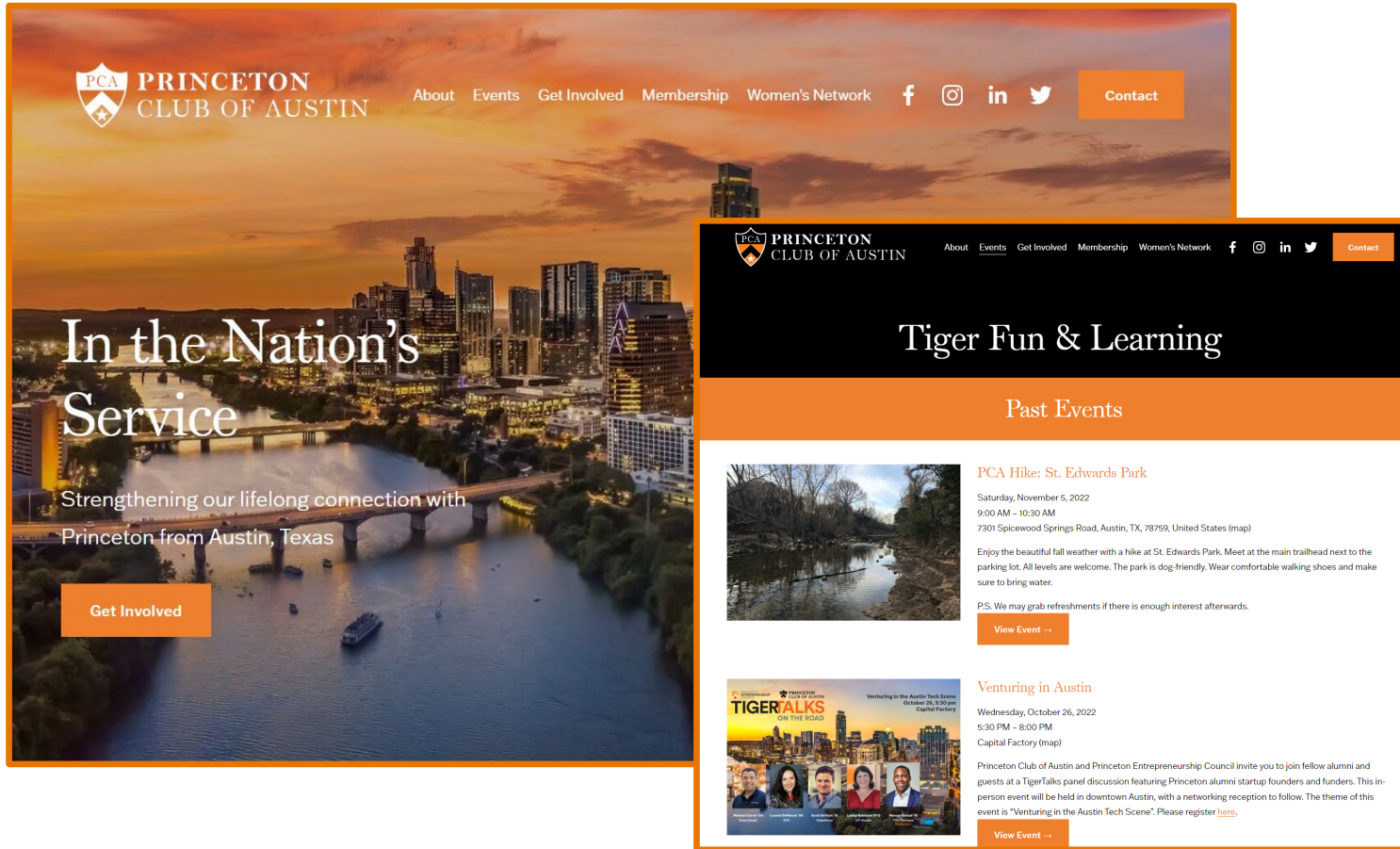
<https://princetoniana.princeton.edu/things-princeton/colors-shields>

- Princeton's Logo & Graphic Identity:

<https://communications.princeton.edu/guides-tools/logo-graphic-identity>

- Full graphic identity guide (aka 'brand kit'): contact Alumni Engagement Office

# Princeton Colors & Fonts in Austin



## Newsletter Excerpt

### Lunar New Year Dim Sum

Sunday, February 6th @ noon

The Year of the Tiger is almost upon us! In collaboration with the [Asian American Alumni Association of Princeton](#) (A4P), we're eager to celebrate with fellow Tigers at our inaugural Lunar New Year Dim Sum brunch in Austin!



We have tables reserved on the outdoor heated patio of Wu Chow in downtown Austin. Please register [here](#) for the event. No pre-payment is required, but expect to pay \$20-25. Dues-paying members will get \$5 off their bill.

Thank you to Po Wah Moon '15 for being our event champion!

### Hockey Night

Saturday, February 26th @ 6:00 PM

Save the date for a hockey game watch with our friends from the Cornell Alumni Club of Austin!



### Call for Mentors

Princeton Internships in Civic Service (PICS) is a great service opportunity that brings together undergraduates, alumni, and community organizations doing important work. Click [here](#) for more information.



*Tip: Most website design platforms allow you to upload custom fonts*

# Signage fun...



Tip: Upcycle a used retractable banner (i.e. from a tradeshow) and replace the vinyl banner

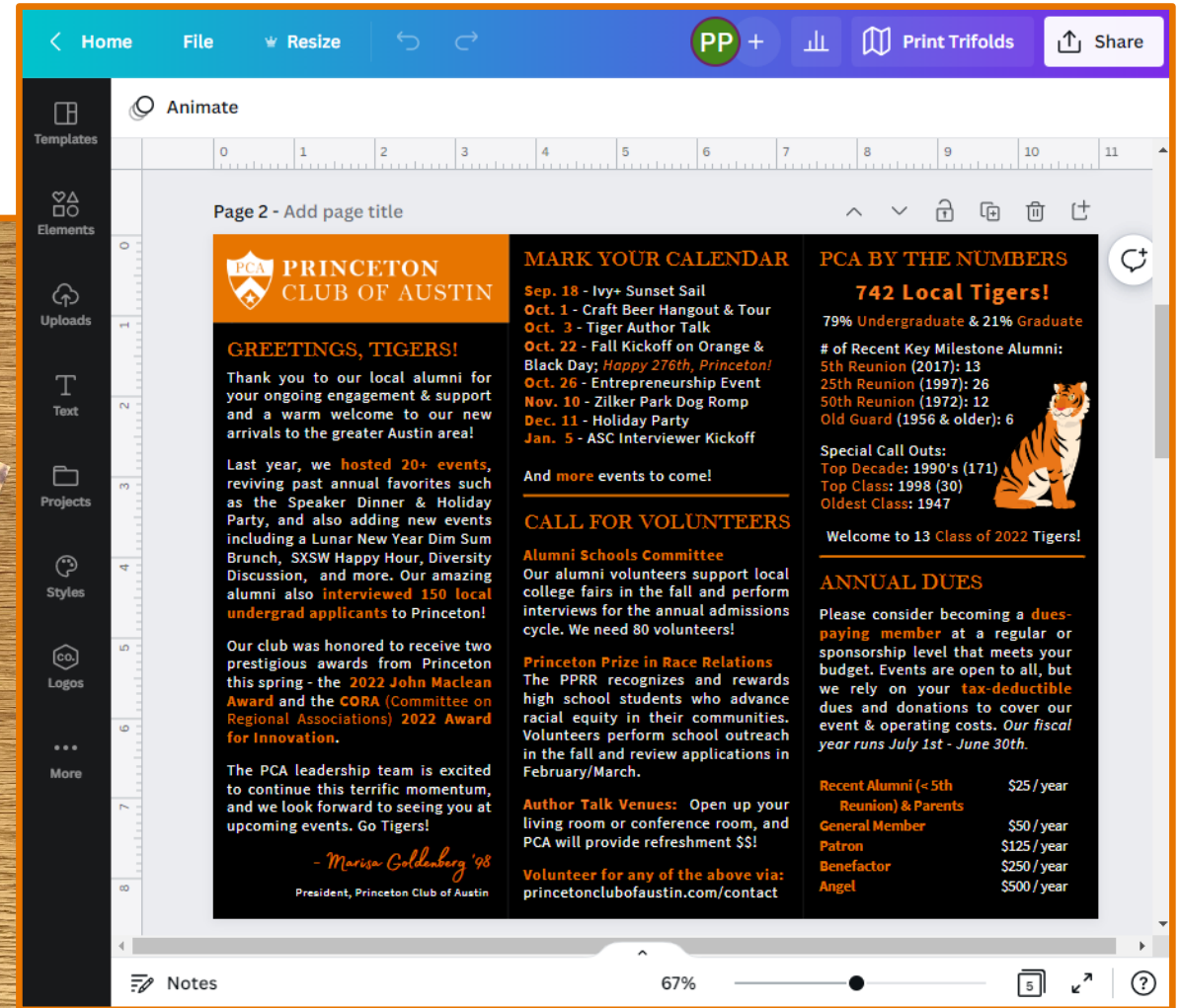
# Annual Mailers



Tips: designed with Canva; "Mandarin" envelopes from Envelopes.com



Tip: Canva Pro subscription is *free* for non-profits!



This lightbulb graphic is from Canva and was changed to Princeton orange!



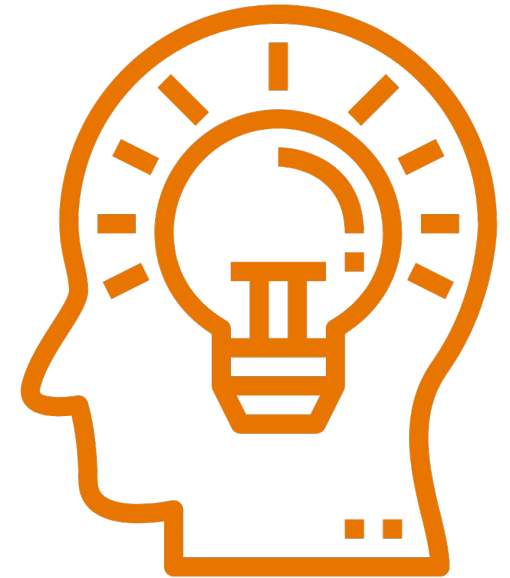
# Marketing Channel Tips

1. **Email via TigerNet** – most effective for event awareness
2. **Social Media** – see best practices featured in February 2022 T-Quad by Stephanie Bachas-Dauchert '10
3. **Website** – helps newcomers who haven't updated TigerNet
4. **Mailers** – reaches every registered local address
5. **Phone / Text** – leverage demographic preferences (tools like [simpletexting.com](http://simpletexting.com) help automate, but are not cheap)

# OPERATIONS

# Knowledge Continuity

- Upfront effort to organize team documentation and create how-to playbooks saves time in the long run
  - Leadership transitions can happen unexpectedly...
- Use a shared & secure location to store entity documentation, financial reports, meeting minutes, venue research, leadership team playbooks, etc.



*Tip: Google Workspace is **free** for nonprofits*

# Google Workspace Examples



Leadership team email accounts on custom domain



Control access at the Team Drive level or at folder level

From: **Membership PCA** <[membership@princetonclubofaustin.com](mailto:membership@princetonclubofaustin.com)>  
Date: Fri, Oct 1, 2021 at 8:05 PM  
Subject: Thank you for supporting the Princeton Club of Austin!

Dear Hilary,

Thank you for supporting the Princeton Club of Austin! Your contribution is much appreciated and will help most of our events remain free and accessible to all.


We are very excited for the 2021-2022 membership year and look forward to seeing you at one of our [upcoming events!](#)

To share feedback for future events, feel free to fill out our [survey](#) or send me an email or call me at the number below. You can also stay in touch via [Facebook](#), [LinkedIn](#), and [Instagram](#).

If you'd like to get involved, please review our current & upcoming [opportunities](#) and contact us via the website. We love volunteers and welcome all kinds of assistance! Of note, we're actively recruiting for Alumni Schools Committee interviewers for the undergraduate admissions cycle as well as committee members for the Princeton Prize in Race Relations.

Go Tigers!

**Alaka Halder '15**  
Membership Chair, Princeton Club of Austin

 **PRINCETON CLUB OF AUSTIN**

Standardized signature blocks (include phone #)



Individual vs. Team Drive



Organized via folders



Tip: Assign minimum 2 Google Workspace admins for redundancy



# Keeping the financials organized...



Tips:

1. Zipbooks Starter package is **free** and hits the basics
2. Set income & expense top-level categories to align with annual financial report (see resource slide at end for sample categories)

Easy input to annual reports:

Basic reports by date range

|                              | 2022 Apr        | 2022 May        | 2022 Jun     | Total           |
|------------------------------|-----------------|-----------------|--------------|-----------------|
| <b>Revenue</b>               |                 |                 |              |                 |
| Membership Dues              |                 |                 |              |                 |
| Young Alumni                 | 40.00           | 20.00           | 0.00         | 60.00           |
| General Member               | 80.00           | 40.00           | 0.00         | 120.00          |
| <b>Membership Dues total</b> | <b>120.00</b>   | <b>60.00</b>    | <b>0.00</b>  | <b>180.00</b>   |
| Event Revenue                | 1,831.41        | 1,450.60        | 46.62        | 3,328.63        |
| <b>Revenue total</b>         | <b>1,951.41</b> | <b>1,510.60</b> | <b>46.62</b> | <b>3,508.63</b> |
| <b>Expenses</b>              |                 |                 |              |                 |
| Appreciation Gifts           | 0.00            | 0.00            | 5.29         | 5.29            |
| Sponsor Gifts                | 0.00            | 0.00            | 0.00         | 0.00            |
| Appreciation Gifts total     | 0.00            | 0.00            | 5.29         | 5.29            |
| Information Technology       | 0.00            | 0.00            | 0.00         | 0.00            |
| Office Expenses              | 0.00            | 0.00            | 0.00         | 0.00            |
| Banking Fees                 | 0.00            | 0.00            | 0.00         | 0.00            |
| Office Expenses total        | 0.00            | 0.00            | 0.00         | 0.00            |
| Social Events                | 0.00            | 0.00            | 0.00         | 0.00            |
| Speaker Events               | 0.00            | 0.00            | 0.00         | 0.00            |
| Other Social Events          | 25.00           | 0.00            | 0.00         | 25.00           |
| General Event Supplies       | 0.00            | 0.00            | 0.00         | 0.00            |
| Social Events total          | 25.00           | 0.00            | 0.00         | 25.00           |
| <b>Expenses total</b>        | <b>25.00</b>    | <b>0.00</b>     | <b>5.29</b>  | <b>30.29</b>    |
| <b>Operating Income</b>      | <b>1,926.41</b> | <b>1,510.60</b> | <b>41.33</b> | <b>3,478.34</b> |
| <b>Other revenue</b>         | <b>0.00</b>     | <b>0.00</b>     | <b>0.00</b>  | <b>0.00</b>     |
| <b>Other expenses</b>        | <b>0.00</b>     | <b>0.00</b>     | <b>0.00</b>  | <b>0.00</b>     |
| <b>Net Income</b>            | <b>1,926.41</b> | <b>1,510.60</b> | <b>41.33</b> | <b>3,478.34</b> |

| Category | Amount   | Description                 | Event               |
|----------|----------|-----------------------------|---------------------|
| Expenses | \$65.74  | Randalls - Baking suppl...  | Fall Kickoff        |
| Expenses | \$120.00 | UT vs. Princeton Basketb... | Other Social Events |
| Expenses | \$109.33 | Eventbrite payout - UT v... | Event Revenue       |

| Financial Report for Princeton Clubs/Associations: |   | CLUB NAME:                 |
|--|---|----------------------------|
|  |   | July 1, 2                  |
| <b>I. Cash Receipts</b>                            |   |                            |
| A.   | Membership dues   |                            |
| B.   | Gifts & contributions:  |                            |
|  | - Cash  |                            |
|  | - Non-cash (attach a statement with the following information provided for each gift: describe property, provide date received & value) |                            |
| C.   | Interest (see instructions)   |                            |
| D.   | Dividends (see instructions)  |                            |
| E.   | Gain (Loss) from sale of securities (see instructions, attach a statement with required information)                                    |                            |
| F.   | Other cash receipts (e.g. class functions, miscellaneous)   |                            |
|  | (Describe type and amount of each)  |                            |
|  | 1)  | \$                         |
|  | 2)  | \$                         |
|  | 3)  | \$                         |
|  | <b>Total other cash receipts:</b>   |                            |
| G.   | Payments from Princeton University  | \$                         |
|  |   | \$                         |
|  | <b>Total payments from Princeton University:</b>  |                            |
|  |   | <b>Total Cash Receipts</b> |
| <b>II. Cash Disbursements</b>                      |   |                            |
| A.   | Office expenses (supplies, telephone, postage, mailings, bank fees)   |                            |
| B.   | Information technology (e.g. hardware, software, support services such as website design, virus protection)                             |                            |
| C.   | PAW subscriptions   |                            |
| D.   | Travel  |                            |
| E.   | Alumni council dues   |                            |
| F.   | Transfers to Princeton (contributions, e.g. payments for annually-funded scholarships)  |                            |
|  | Please describe purpose of transfer   |                            |
| G.   | Insurance   |                            |
| H.   | Other cash disbursements (e.g. class functions, miscellaneous)  |                            |
|  | (Describe type and amount of each)  |                            |
|  | 1)  |                            |

# Treasurer Time-Savers



*Tip: Create an expense report template and store all submissions & receipts in shared Team Drive*

| Expense Date: | Expense Category:   | Amount:  | Description:   | Receipt Filename:                 |
|---------------|---------------------|----------|--|-----------------------------------|
| 08/21/22      | Other Social Events | \$113.97 | Escape room. Note that I am only expensing 3 out of the 7 tickets that I purchased | Escape Room - Classified Room.pdf |

Total Expenses: \$ 113.97

Status: Reviewed and approved by Marion Lewis Krueger, Treasurer, 9/18/22



*Tip: Create Gmail "templates" for quick dues acknowledgements & receipts*

From: Treasurer PCA <treasurer@princetonclubofaustin.com>  
Date: Sun, Oct 23, 2022 at 3:24 PM  
Subject: Thank You for Your Contribution to the Princeton Club of Austin

Dear Princeton Club of Austin Member,

Thank you for contributing to the Princeton Club of Austin at the Patron level.

For your records, the Princeton Club of Austin has received your contribution of \$250.00 and if your contribution totaled \$250 or more, you will receive a Patron membership for the year.

Should you have any questions or need further information, please contact me at treasurer@princetonclubofaustin.com

Go Tigers!

**Marion Lewis Krueger '18**  
Treasurer, Princeton Club of Austin

PCA PRINCETON CLUB OF AUSTIN

# Little Details for Big Impact

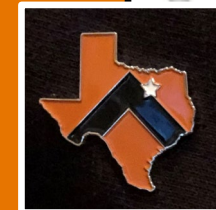
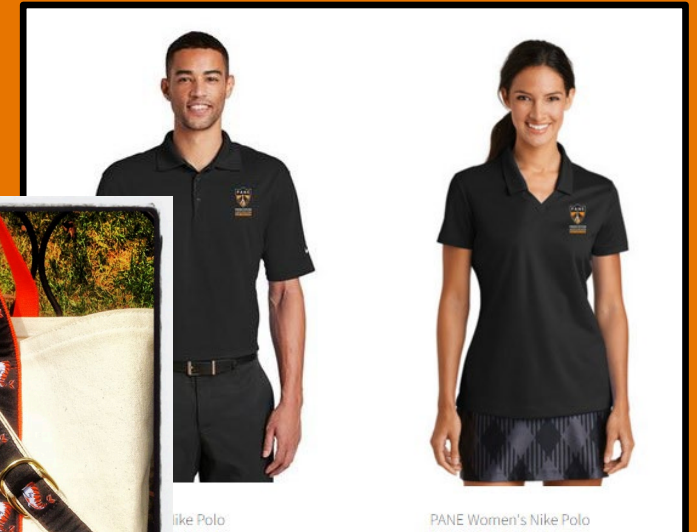
*Edible table décor*



*Princetonian vineyard wine for events (e.g. Kingston, Marimar)*



*Regional swag & lapel pins*



*Welcome*

*Send a welcome note to new grads in your region!*

# More Little Details...

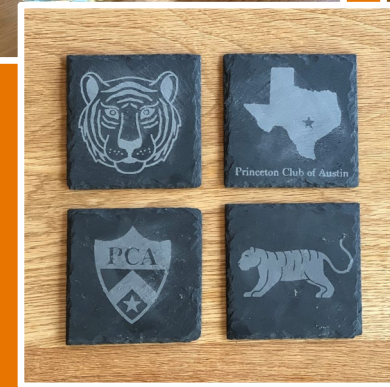
*Regional or Tiger gifts as prizes*



*Special cane for the oldest event attendee*



*Sponsor dues appreciation*



*Tip: make handmade club sponsor gifts with donated labor to keep costs within the \$11.30 IRS insubstantial premium threshold, maintaining full tax-deductibility of sponsor dues > \$56.50*



*Make special custom name tags for admitted students with the class year at a Spring Admit Party*




*Tigers!*

# Personalization & Segmentation

Show your 90's spirit... External Correspondence/Official Communications x

Hilary Bellm '97 ~ Rowena Dasch '97 ~ Marisa Goldenberg '98 ~ Meredith Cage '99 <tig... Wed, Apr 13, 12:08 PM ☆  
to me ▾



**...by coming to the PCA Speaker Dinner!**

Dear `#{First_Name}`,

We'd be thrilled to see a strong showing of **90's alumni** at our revived flagship annual event, the Speaker Dinner! It's coming up on May 11th.

Register for tickets [HERE](#) and get your **Princeton Club of Austin Lapel Pin** just in time for Reunions!

Fun Facts: We have 22 Austin area alumni celebrating their **25th Reunion** this year, 7 celebrating their **30th Reunion**, and a roaring 152 total with a Princeton degree during the 90's!!

For the dinner, we'll do our best to assign tables by age group, so it will be a fun opportunity to re-connect with former classmates and meet new Tigers from your decade. There'll still be plenty of time to mingle with all alumni during our cocktail reception too.

Hope to see you there!

Tiger Cheers,

Hilary Bellm '97, Rowena Dasch '97, Marisa Goldenberg '98 & Meredith Cage '99

p.s. - we are grateful for any dinner sponsorships or additional donations to help subsidize the increasing costs of large event food & staffing.

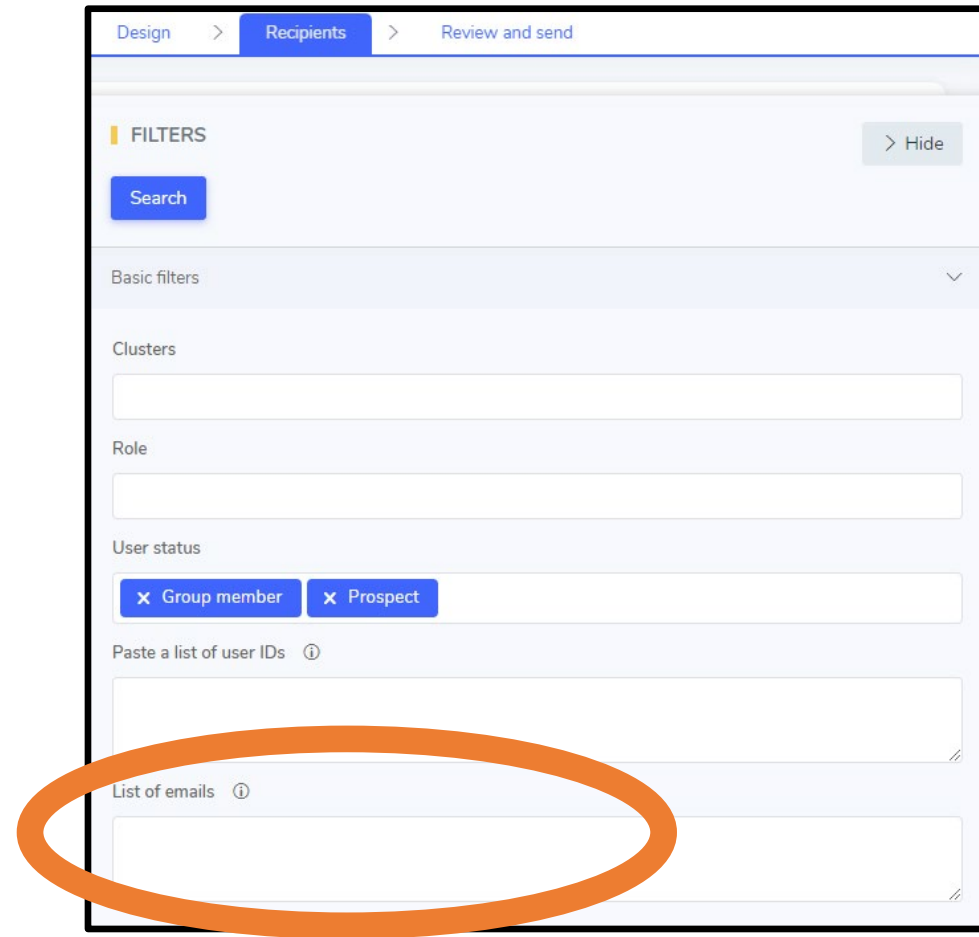
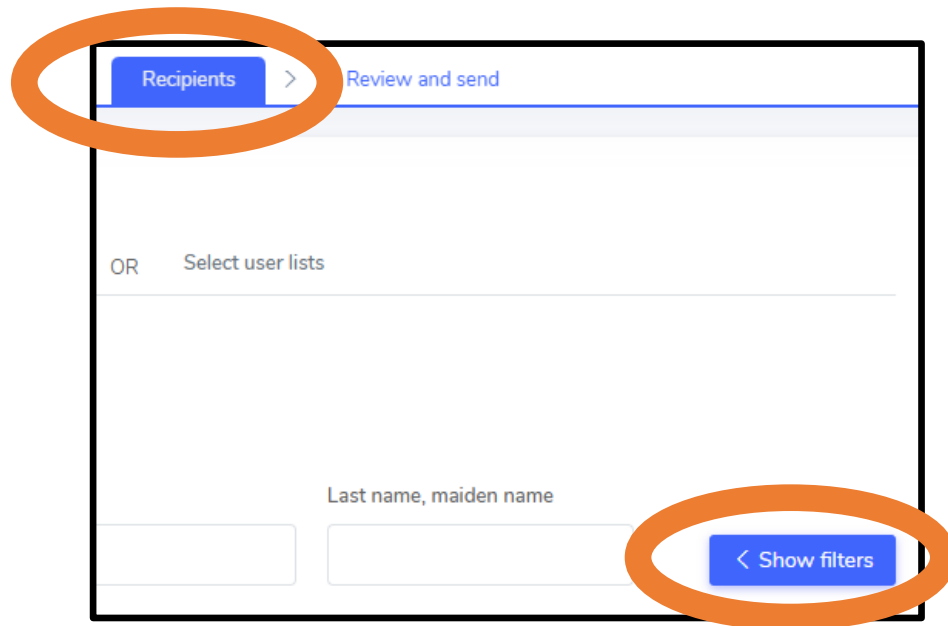
Some ways to boost open rates & engagement:

1. Leverage TigerNet to send personalized emails and/or by segment (i.e. decade)
2. Email greeting by name - `#{First_Name}`
3. Use “senders” representing the segment
4. Customize subject and content

# How to Segment in TigerNet 2.0

1. Go to Recipients tab & click Show Filters button
2. Paste desired list of emails (requires pre-filtering in an offline spreadsheet roster)

OR just ask TigerNet Help Desk for assistance!!



\$\$\$

# Tips to Save \$\$

Buy event food & drinks at warehouse stores (e.g. Costco, Sam's Club, etc.)



Shop post-Halloween sales for orange & black décor & supplies



Leverage non-profit status for sales tax exemptions



Examples:

- Restaurants
- Service providers
- Grocery stores
- Postage (requires application with USPS)

Buy multi-year quantities (lapel pins, envelopes, etc.)



Costco sells orange gerbera daisies online in bulk



Discover awesome finds at thrift shops or upcycling stores



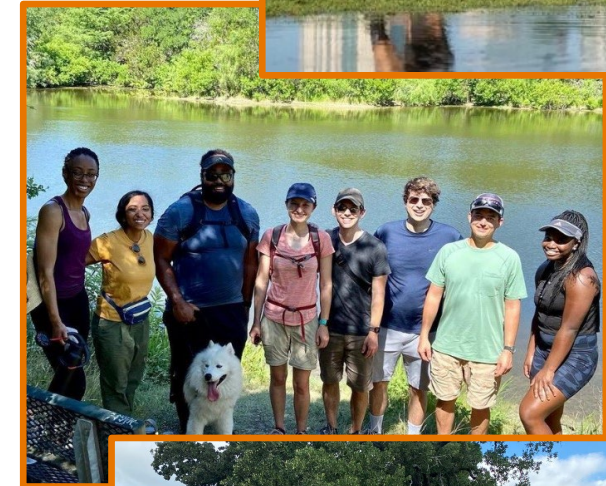
Example deals:

- \$2 easel for signs
- \$20 retractable banner equipment (retail price \$900+)



# Money-Saving Events & Venues

- Informal events - hikes, trivia nights, dog romps, hobby hours, etc.
- Local author talks / guided discussions
- Group community service events
- Gather at outdoor art exhibits, concerts in a park, or festivals
- Princeton sponsored events – e.g. Princeton Entrepreneurship Council TigerTalks on the Road
- Retirement communities (low-cost auditoriums, community rooms)
- Find local alumni serving on boards of local organizations & ask for free hosted tours of museums, parks, etc.



# Revenue Boosters

1. Grants – i.e. [CORA](#), [PWN](#), [APGA](#)
2. Event Sponsors
3. Annual Dues (*note: never required for “membership”*)
  - a) Consider discounts for recent alumni, parents, Old Guard
  - b) Consider sponsorship tiers



*If you collect dues, 10% local alumni participation is a great target!*

*(may take a few years to get there)*



*Tips: periodic physical mailers can drive awareness and higher dues participation; regular activities & multi-channel communication with event updates & photos demonstrate regional “value” and can also boost dues contributions*

# Thank you!

## Questions? Email us anytime!



Marisa Goldenberg '98

[president@princetonclubofaustin.com](mailto:president@princetonclubofaustin.com)



Marion Krueger '18

[treasurer@princetonclubofaustin.com](mailto:treasurer@princetonclubofaustin.com)

**POST-PRESENTATION  
DISCUSSION SUMMARY**

# Question:

How much time does it take to do ALL of this? We have a small team.

- It is **NOT** necessary to do everything in this presentation simultaneously. **Start small, go gradually** – pick one thing to focus on at a time, and you can build momentum over time.
- **Start with hosting an event** to bring people together and share that you a) want to reinvigorate your club and b) that you need help (reboot donations, dues, volunteers, etc.)
  - **In-person** events can be **BYO/Potluck** if you don't have any cash reserves to pay for snacks – can do a reinvigoration event any time, but a **holiday party** is a great idea!
  - **Virtual events** are also easy, and you can **partner** with a neighboring bigger / more established region for something joint
- Leverage TigerNet Help Desk to assist with email communications to your regional alumni
  - Email [alumnivolunteers@princeton.edu](mailto:alumnivolunteers@princeton.edu) or call **855-249-1829**

# Question:

How much \$\$ do you need on hand per local alumni capita to reboot a club?

- You **can reboot a club with \$0 in the bank** – by hosting free events, requiring donations or tickets at the door to cover food & drink expenses, getting sponsors for events, or by holding BYO/Potluck events
  - Ask Alumni Engagement for a “Party Pack” with Princeton tablecloths, balloons, etc.; and/or use your Orange & Black Day party box swag
  - Create FOMO by including event photos in future email communications and/or social media
- As a *reboot investment example*, PCA had \$2,400 in cash reserves when embarking on a reboot in Fall 2021, with ~700 local alumni. Decided as a Board to make the investment with eye-catching mailer, new website & tasty food for a Fall event, assuming we could recover the \$ and more with dues
  - Spent ~\$1,000 on a physical mailer in late September ‘21
  - Spent ~\$500 on snacks at an October park event - tacos, pizza, chips, kid & adult beverages
  - Spent ~\$200 on website hosting fees good for 12 months
  - Collected ~\$3,000 in dues by end of October ‘21 covering those expenses and our big annual holiday party expenses; collected another ~\$2,000 by end of March ‘22 (*with track record of 20+ events last year, PCA collected ~\$5,000 in dues within 6 weeks of our mailer this year*)

# Question:

## How much does a physical mailer cost?

- PCA's most recent brochure on slide # 12 cost **\$1,015 for 755 mailed pieces** via a full-service local print shop (printing, folding, stuffing, envelope addressing, postage). Design done entirely in Canva.
- Cost savers:
  - Leveraged **non-profit bulk mail postage rates** by completing USPS nonprofit application
  - PCA did an initial **address clean-up** to combine mailers for alumni spouses (saved ~\$50-75)
  - Print shop also ran addresses through their system for a clean-up - removed invalid addresses and people who had moved away from Austin per USPS
  - If PCA had done the folding & envelope stuffing and labeling ourselves, could have saved a few hundred \$ - but not sure we could have gotten the nonprofit bulk mail rates without the print shop
  - Consider sending physical mailer **every few years**, or **just to older demographics** in alumni roster
  - Use **tax exempt status** to avoid sales tax on print shop services
- Other points:
  - NDA / strict privacy policy required for print shops using our mailing list to perform services
  - Princeton Mail Services is also an option you can pay for – but need to plan for lead-time
  - PC South Florida spent \$300 mailing newsletter to 100 oldest alumni – recouped it & more!

# Question:

To segment your mailings, you need to download your entire roster from the University into an Excel sheet – how frequently are you doing this?

- PCA gets a roster 1-2 times a year, so some of our segmentation emails will inevitably miss some people. We don't segment our emails that often – but save for major events where the targeted marketing will make a bigger impact (e.g. Speaker Dinner, Fall Kick Off)
- Suggestion: **leverage TigerNet Help Desk for assistance** with these emails. They should have the data available and can help load the email segments into TigerNet 2.0 for you.



# Question:

Does Zipbooks automatically connect with your bank account and create categories?

- Believe Zipbooks has ability to automatically download transactions, but this \*may\* require one of their paid subscriptions (not 100% sure).
- PCA created the accounting categories ourselves, but made sure to include parent-level categories that easily map to the data required for Princeton's annual club financial reports
- For reference, PCA accounting categories are on the next slide

# Additional Reference (ZipBooks)

Sharing PCA's accounting categories for reference. Note, the higher-level parent categories easily tie to Princeton's annual financial report. Some parent categories and all the sub-categories are optional – but PCA uses them for internal tracking.

| <input type="checkbox"/> Revenue          |                        |
|---|------------------------|
| <input type="checkbox"/> Membership Dues  | Parent Revenue         |
| <input type="checkbox"/> Young Alumni     | Parent Membership Dues |
| <input type="checkbox"/> General Member   | Parent Membership Dues |
| <input type="checkbox"/> Patron           | Parent Membership Dues |
| <input type="checkbox"/> Angel            | Parent Membership Dues |
| <input type="checkbox"/> Benefactor       | Parent Membership Dues |
| <input type="checkbox"/> Event Revenue    | Parent Revenue         |
| <input type="checkbox"/> General Donation | Parent Revenue         |
| <input type="checkbox"/> Grant            | Parent Revenue         |
| <input type="checkbox"/> Other revenue    |                        |

| Expenses                          |                           |
|-----------------------------------|---------------------------|
| Alumni Council Dues               | Parent Expenses           |
| Leadership Meetings               | Parent Expenses           |
| Appreciation Gifts                | Parent Expenses           |
| Sponsor Gifts                     | Parent Appreciation Gifts |
| Other Gifts                       | Parent Appreciation Gifts |
| Information Technology            | Parent Expenses           |
| Office Expenses                   | Parent Expenses           |
| Printing & Postage                | Parent Office Expenses    |
| Banking Fees                      | Parent Office Expenses    |
| Alumni Schools Committee Supplies | Parent Office Expenses    |

| Social Events            | Parent Expenses      |
|--------------------------|----------------------|
| Spring Admit Party       | Parent Social Events |
| Fall Kickoff             | Parent Social Events |
| Winter Holiday Party     | Parent Social Events |
| Alumni Schools Committee | Parent Social Events |
| Speaker Events           | Parent Social Events |
| Summer Party             | Parent Social Events |
| Other Social Events      | Parent Social Events |
| General Event Supplies   | Parent Social Events |

# Question:

Do you do any analytics on your alumni to highlight who has come to a lot of events, and do you target those people to pay dues and/or volunteer?

- PCA tracks attendance at every event as well as dues payment history in a master google spreadsheet
  - Board has discussed leveraging our data to send targeted dues nudges to people who have been to events but not contributed \$, or people who paid dues historically but not recently
    - Given the already strong dues collections this fall, we haven't done this yet
    - Note: **all alumni are automatically a member of a regional association** - dues are not mandatory; we appreciate when people pay what they can, but we appreciate event attendance as well!
- Yes, definitely ask event attendees (either frequent attendees or at a reboot event) about volunteering!
  - PCA gained 4 new leaders instrumental to our reboot from a May '21 outdoor event
  - Have recruited others and continue to recruit more from regular attendee pool
  - Doesn't need spreadsheet tracking – you'll recognize the familiar faces/names!

# Other Tips:

- Venmo works great for on-the-spot dues collection at events
  - More people have this app on their phone than PayPal
  - Venmo business kit comes with a placard for our welcome tables with a QR code
- Checks are more typically used by older alumni and arrive shortly after physical mailers are received
- Doodle polls are great to vote on potential days/times for leadership team meetings
- Target is a great store for post-Halloween orange & black décor sales
- The homemade PCA sponsor gifts & prizes on slide # 20 were made with a Cricut machine – an easy-to-use digital cutting machine with an intuitive design app for paper, vinyl and other materials
  - Recruit a local alumni with a machine who would be willing to volunteer labor and make cute Tiger & regional themed gifts for your club, or bring machines to a crafting event for multiple volunteers to assist

# PCA Templates to Share:

Feel free to contact PCA for any of these materials and customize for your own club!

- Expense report template
- Gmail templates:
  - Dues acknowledgment from Treasurer
  - Formal receipt for \$250+ donations from Treasurer
  - Welcome message from Membership Chair
- Tactical playbooks for Treasurer & Communications Chairs (some things specific to PCA)
- Example template for formal authorization to change bank account signers / owners
- Blank template for tracking dues & event attendance over time
- Sample meeting agenda & minutes
- Links to Canva tri-fold brochure designs (will require a Canva account of your own to view the designs)