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

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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

For more information, visit: http://alumni.princeton.edu/volunteer/committees/
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:
- **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;
- **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

- John R. Nealon '77, Chair
- Courtney Coleman Everson '03, Vice Chair
- Stephanie Anderson '74
- Kate Bellin '02
- Bryant Blount '08
- Sandra Tsang Cohen '89
- Andrew Lewis '12
- Zhan Okuda-Lim '15
- Emma Parish '21
- Ted Stephens '95
- Melissa Zdrodowski '94
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
- Identify 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
- Establish a timetable of Class activities each year
- Write at least one letter to the Class annually in conjunction with the other class officers
- Attend Service of Remembrance at Alumni Day
- Send appropriate thank-you letters/emails to all class members who assist with class activities and/or functions
- Handle officer appointments or replacements
Vice-President

- Act 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
- 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

- Maintain 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
- Prudently 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

<table>
<thead>
<tr>
<th>May-July</th>
<th>August</th>
<th>September</th>
<th>October</th>
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| - 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) |

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<tr>
<th>November</th>
<th>December</th>
<th>January</th>
<th>February</th>
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| - 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 |

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<tr>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
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| - 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

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.

Regional Volunteers
Resources include the regional officers’ handbook, forms, reporting, planning documents, policy information and printing and mailing.

Volunteer Recognition
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
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

https://alumni.princeton.edu/tigernet/onlinecommunity
# TigerNet Help Desk

<table>
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<tr>
<th>TigerNet Online Community Help Desk</th>
<th>TigerNet Volunteer Tools Help Desk</th>
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<tr>
<td>For issues related to:</td>
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<tr>
<td>Alumni Directory</td>
<td>Broadcast Email</td>
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<td>Website Content Management</td>
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<td><a href="mailto:tigernet@princeton.edu">tigernet@princeton.edu</a></td>
<td><a href="mailto:alumnivolunteers@princeton.edu">alumnivolunteers@princeton.edu</a></td>
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<td>609-258-1542</td>
<td>855-249-1829</td>
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<td>8:00 a.m. – 6:00 p.m. ET</td>
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<td>10:00 a.m. – 3:00 p.m. ET</td>
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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

• 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 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 125 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+)
Leadership Search

Leadership Search

Class Leadership Search

Class Year:
- 2020
- 2019
- 2018
- 2017

Role:
- President
- Reunion Chair
- Scholarship Fund Chair
- Secretary
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

https://alumni.princeton.edu/volunteer/awards
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 Resources! (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)