Class Officers’ Guide to Engagement
Martha Reardon Bewick ’62
Susan Lohin, Director, Alumnae Connections
History of Classes
<table>
<thead>
<tr>
<th>FUNDRAISING VOLUNTEERS</th>
<th>ALUMNAE ADMISSION REPRESENTATIVES</th>
</tr>
</thead>
<tbody>
<tr>
<td>GROUPS</td>
<td>CLUBS</td>
</tr>
</tbody>
</table>

CLASS
VOLUNTEERS

WELLESLEY
The mission of the Wellesley College Alumnae Association is to support the Institutional Priorities of the College by connecting alumnae to the College and to each other. The Association serves as a lifelong resource to alumnae and encourages alumnae to contribute to the continued excellence of the College.
Successful Leadership

- Delegate
- Appreciate
- Listen
- Develop future leaders
- Communicate goals
President

- Sets goals
- Schedules all class and board meetings and determines agenda
- Drives communications
- Writes at least one, preferably two, class letters each year
- Submits annual report
- Appoints nominating, record book, and reunion chairs in 4th year.
Vice President

- Spearheads Mini Reunion program

- Files online mini reports

- Assumes role of President in her absence
Board Responsibilities

Treasurer

- Sets budget
- Maintains class accounts, collects class life membership dues and submits CLM money and names to the WCAA
- Submits financial report to the WCAA and 990N to the IRS
Board Responsibilities

Secretary

- Writes class notes for the *Wellesley* magazine four times per year – **Deadlines**

- **Takes minutes** at all board meetings, class meetings, and Reunion meetings

- **Submits** a copy of minutes, and reunion class meeting: Wclasses@alum.wellesley.edu
Board Responsibilities

- **Wellesley Fund Representative**
  - Supports Wellesley College financially
  - Manages class fund-raising campaign
  - **Recruits** Wellesley Fund assistants
  - Contributes to class and appeals letters, reports on gift results
  - Attends ALC
  - Works with the Wellesley Fund Office to recruit special gifts chair
Board Responsibilities

Regular Meetings

- Conference calls
  - Freeconferencercall.com
  - Doodle.com
- Direct calls with your president
- Emails
Board Responsibilities

- **Connect**
  *Locate and communicate*

- **Engage**
  *Interact and get involved*

- **Develop**
  *Identify and encourage*
Board Responsibilities

- Attend ALC
- Organize events
- Communicate regularly
- Manage finances
- Set dues and encourage class life memberships
Class Life Membership

- **Goal** – CLM at 50% by 25th year
- **Generation to Generation fund**
  - $15,000 gift from Class of 1952 in 2012 to assist young classes with finances
  - WCAA: goals for the *young classes*
    - 2008 - 2014: 25 new members in 2 years
    - 2000 - 2007: 50 new members in 2 years
    - If goals are met - WCAA will add $1,500 to CLM invested in the endowment.
  - Appeal to classes 60+ years out to consider donating to this fund.
Board Reporting Responsibilities

- **WCAA Reports**
  - Annual reports (president)
  - Financial report, IRS 990N (treasurer)
  - Mini reunion reports (vice-president)
  - Minutes (secretary)
    - Board meetings
    - Class meeting at Reunion

- **Database updates**
  - New contact information or death of a classmate
    - Call the Alumnae Office, 781-283-2331 or 1-800-339-5233
    - updates@alum.wellesley.edu
Communication
The best way to communicate with your classmates is......
Regularly!
Communication Plan

- Key information
- Method/Tool
- Deadlines
- Responsible volunteer/board member

### Communication Plan

<table>
<thead>
<tr>
<th>Time of Year</th>
<th>Project</th>
<th>Position</th>
<th>Tool</th>
<th>Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer</td>
<td>Collect Class Notes for September deadline</td>
<td>Secretary</td>
<td>Broadcast Email</td>
<td>August 15</td>
</tr>
<tr>
<td>July</td>
<td>Advertise summer mini reunion</td>
<td>Vice President of Communications</td>
<td>Broadcast Email, Facebook, Website</td>
<td>July 25</td>
</tr>
<tr>
<td>August</td>
<td>Executive Board Conference Call</td>
<td>All Officers</td>
<td>Preconference call</td>
<td>August 10</td>
</tr>
<tr>
<td>August</td>
<td>Complete Class Financial Report</td>
<td>Treasurer</td>
<td>Financial Report provided by WWA</td>
<td>August 30*</td>
</tr>
<tr>
<td>September 1</td>
<td>Submit Class Notes column to the Wellesley Magazine</td>
<td>Secretary</td>
<td>Email</td>
<td>September 1*</td>
</tr>
<tr>
<td>September</td>
<td>Postclass from mini reunion to Facebook and Website</td>
<td>Treasurer</td>
<td>Chapter Pages and Feedback</td>
<td>By end of month</td>
</tr>
<tr>
<td>September - October</td>
<td>Class Newsletter</td>
<td>President (for all)</td>
<td>Local print shop (Treasurer/Office Manager)</td>
<td>October 15</td>
</tr>
<tr>
<td>November</td>
<td>Submit Class Notes column to the Wellesley Magazine</td>
<td>Secretary</td>
<td>Broadcast Email and/or Facebook</td>
<td>November 15*</td>
</tr>
<tr>
<td>December</td>
<td>Submit Class Notes column to the Wellesley Magazine</td>
<td>Secretary</td>
<td>Email</td>
<td>December 1*</td>
</tr>
<tr>
<td>Winter</td>
<td>Holiday/Winter Greeting to entire class</td>
<td>President</td>
<td>Broadcast Email</td>
<td>December 20</td>
</tr>
<tr>
<td>January</td>
<td>Collect Class Notes for March deadline</td>
<td>Secretary</td>
<td>Broadcast Email and/or Facebook</td>
<td>February 10</td>
</tr>
<tr>
<td>February</td>
<td>Final Class Notes</td>
<td>Secretary</td>
<td>Facebook</td>
<td>February 20</td>
</tr>
<tr>
<td>March 1</td>
<td>Submit Class Notes column to the Wellesley Magazine</td>
<td>Treasurer</td>
<td>Email</td>
<td>March 1*</td>
</tr>
<tr>
<td>Spring</td>
<td>Advertise spring class reunion</td>
<td>President</td>
<td>Broadcast Email, Website, Facebook</td>
<td>March 30</td>
</tr>
<tr>
<td>Spring</td>
<td>Phone call reminders for spring reunion</td>
<td>Vice President and Chairs</td>
<td>Telephone</td>
<td>April 1</td>
</tr>
<tr>
<td>Early April</td>
<td>Collect Class Notes for May deadline</td>
<td>Secretary</td>
<td>Broadcast Email and/or Facebook</td>
<td>April 15</td>
</tr>
<tr>
<td>April</td>
<td>Postcards from spring reunion to Facebook and Website</td>
<td>Treasurer</td>
<td>Chapter Pages and Facebook</td>
<td>April 30</td>
</tr>
<tr>
<td>April</td>
<td>Final Class Notes column for the final year</td>
<td>Treasurer</td>
<td>Broadcast Email</td>
<td>April 30</td>
</tr>
<tr>
<td>May 1</td>
<td>Submit Class Notes column to the Wellesley Magazine</td>
<td>Secretary</td>
<td>Broadcast Email and/or Facebook</td>
<td>May 1*</td>
</tr>
<tr>
<td>May 1</td>
<td>Submit Class Notes column to the Wellesley Magazine</td>
<td>Secretary</td>
<td>Broadcast Email and/or Facebook</td>
<td>May 1*</td>
</tr>
<tr>
<td>June</td>
<td>Submit Class Notes column to the Wellesley Magazine</td>
<td>Treasurer</td>
<td>Email</td>
<td>June 15*</td>
</tr>
<tr>
<td>June</td>
<td>Complete Annual Report</td>
<td>President</td>
<td>Annual Report provided by WWA</td>
<td>June 30*</td>
</tr>
</tbody>
</table>

*These dates/deadlines are permanent and will not vary from class to class.*
Communication Tools

- Newsletters
- Emails
- Websites
- Social Media
- Telephone calls
- Birthday or holiday cards
Communication: Annual Newsletter

- Heartfelt letter from President
- Ask for class news
- Solicit class dues
- List & thank lifetime members
- List upcoming mini reunions
- Ask for volunteers
  - Cards, mini reunions, etc.
- Include a link to class website
Postal Mail

- Consider your demographic
- Budget for one hard copy newsletter each year
- What is the goal?
  - A card is a personal touch, but what is the return?
  - A newsletter may be more work, but is more cost effective, more informative
  - Budget accordingly
Postal Mail: Logistics

Printing options:

- You may use any vendor to print
  - Shop around for the best pricing; retailers, copy shops, and online
    - http://www.modernpostcard.com/
    - http://www.vistaprint.com
    - Download an list of classmate contact information from Vconnect or use online request form

- WCAA can print and mail for
  - Your class will be invoiced
E-newsletter

- Content to consider:
  - List upcoming mini reunions
  - Ask for class news
  - Solicit dues and thank paying members
  - Ask for volunteers
  - Include a link to class website and Facebook group
E-mail Marketing

❖ Best Practices:
  ❖ Write relevant, compelling subject:
    ❖ Wellesley Class ’59 Mini Reunion in Seattle
    ❖ Wellesley 2014 - Day to Make a Difference activities
Communication: E-mail

- **Current system:**
  - VConnect
    - Create the email on your own
    - Submit a request

- **New in 2015:**
  - AlumniMagnet – demo tomorrow
    - Training provided via webinars and WCAA staff
Communication: Class Website

- All classes have a web presence
  - Landing Page
  - Chapter Page
  - Self-created

- 2015AlumniMagnet
  - Website demo on Sunday!
Communication: Class Website

- Welcome
- Officers
- Events
- Photo page
- Membership page
- News
- Get Involved
- In Memory
Best Practices:
- Appoint a Webmistress
- Update *at least* once a month
- Have class contact information
Communication: Facebook

- Alumnae must join and check the group to see updates
- Post content at least twice a week
- Include a link to your Facebook group on your website
- Ask questions, tag classmates, and keep conversations flowing
Communication: Telephone Calls

- Promote mini reunions
- Obtain email addresses
- Solicit feedback on class activities
- Connect!
- Use sparingly for the most impact
Communications: Best Practives

- Market on all platforms:
  - Invitations – mailed 4-6 weeks in advance
  - Information in a newsletter
  - Post on class website
  - Email invitations (with links to more information on your website)
  - Reminder calls
  - Events on Facebook
Communication Goals

- One hard copy mailing a year
- Broadcast email quarterly (at least)
- Update website monthly and FB often
- Area phone tree before mini reunions
## Communication Plan

### Class Officers' Sample Communication Plan

<table>
<thead>
<tr>
<th>Time of Year</th>
<th>Project Description</th>
<th>Position</th>
<th>Tool</th>
<th>Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>September</td>
<td>Collect Class Notes for September deadline</td>
<td>Secretary</td>
<td>Broadcast Email and/or Facebook</td>
<td>August 16</td>
</tr>
<tr>
<td>August</td>
<td>Advertise summer mini reunion</td>
<td>Vice President/Website</td>
<td>Broadcast Email, Facebook, Website</td>
<td>July 31</td>
</tr>
<tr>
<td>August</td>
<td>Complete Class Financial Report</td>
<td>Treasurer</td>
<td>Financial Report provided by WCAA</td>
<td>August 30</td>
</tr>
<tr>
<td>September</td>
<td>Submit Class Notes column to the Wellesley Magazine</td>
<td>Secretary</td>
<td>Email</td>
<td>September 1</td>
</tr>
<tr>
<td>September - October</td>
<td>Update Class Website</td>
<td>Webmaster</td>
<td>Chapter Pages and Facebook</td>
<td>By end of month</td>
</tr>
<tr>
<td>November</td>
<td>Submit 3rd EC Paperwork thatChelsea is IMSA and easy to WCAA</td>
<td>President</td>
<td>Broadcast Email and/or Facebook</td>
<td>November 20</td>
</tr>
<tr>
<td>November</td>
<td>Collect Class Notes for December deadline</td>
<td>Secretary</td>
<td>Broadcast Email and/or Facebook</td>
<td>November 20</td>
</tr>
<tr>
<td>December</td>
<td>Submit Class Notes column to the Wellesley Magazine</td>
<td>Secretary</td>
<td>Email</td>
<td>December 20</td>
</tr>
<tr>
<td>December</td>
<td>Holiday/Winter Meeting to end class</td>
<td>President</td>
<td>Broadcast Email</td>
<td>December 20</td>
</tr>
<tr>
<td>Winter</td>
<td>Mini Reunion Planning</td>
<td>Vice President</td>
<td>Emails, Conference Call</td>
<td>February 28</td>
</tr>
<tr>
<td>February</td>
<td>Collect Class Notes for March deadline</td>
<td>Secretary</td>
<td>Broadcast Email and/or Facebook</td>
<td>February 16</td>
</tr>
<tr>
<td>February</td>
<td>Plan Class Date/CLM solicitations</td>
<td>Treasurer</td>
<td>Postcard and/or Broadcast Email</td>
<td>February 28</td>
</tr>
<tr>
<td>March 1</td>
<td>Submit Class Notes column to the Wellesley Magazine</td>
<td>Secretary</td>
<td>Email</td>
<td>March 1</td>
</tr>
<tr>
<td>Spring</td>
<td>Advertise springtime mini reunion</td>
<td>Vice President</td>
<td>Broadcast Email, Website, Facebook</td>
<td>March 30</td>
</tr>
<tr>
<td>Spring</td>
<td>Phone call reminder for mini reunion</td>
<td>Vice President and Chairs</td>
<td>Telephone</td>
<td>April 7</td>
</tr>
<tr>
<td>Early April</td>
<td>Collect Class Notes for May deadline</td>
<td>Secretary</td>
<td>Broadcast Email and/or Facebook</td>
<td>April 15</td>
</tr>
<tr>
<td>April</td>
<td>Post photos from mini reunion to Facebook and website</td>
<td>Website</td>
<td>Chapter Pages and Facebook</td>
<td>April 28</td>
</tr>
<tr>
<td>April</td>
<td>Final CLM solicitation of the fiscal year</td>
<td>Treasurer</td>
<td>Broadcast Email</td>
<td>April 30</td>
</tr>
<tr>
<td>May 1</td>
<td>Submit Class Notes column to the Wellesley Magazine</td>
<td>Secretary</td>
<td>Broadcast Email and/or Facebook</td>
<td>May 1</td>
</tr>
<tr>
<td>May 1</td>
<td>Send CLM contribution to WCAA</td>
<td>Treasurer</td>
<td>Mail list and check</td>
<td>May 1</td>
</tr>
<tr>
<td>June</td>
<td>Complete Annual Report</td>
<td>President</td>
<td>Annual Report provided by WCAA</td>
<td>June 30</td>
</tr>
</tbody>
</table>

*These dates/deadlines are permanent and will not vary from class-to-class.
Leadership Succession

- Start a binder or folder
  - Meeting minutes
  - Notes and decisions
  - Reports
  - Attendee lists

- Ask for volunteers in your communications

- Collaborate closely with your nominating chair
# Alumnae Association Staff

<table>
<thead>
<tr>
<th>Executive</th>
<th>Communications and Technology</th>
</tr>
</thead>
</table>
| Susan Challenger ’76  
  Executive Director | Janet McKeeney ’88  
  Assistant Director |
| Heather MacLean  
  Director | Liz Carey  
  Director of Marketing/Communications |
| Cindy Tashjian  
  Assistant Director | Scott Gordon  
  Manager of Alumnae Technology |
| Liza Carey  
  Interim Asst. Director of Communications |
| | Keira Bunn  
  Interim Asst. Director of Communications |

<table>
<thead>
<tr>
<th>Alumnae Connections</th>
<th>Wellesley Magazine</th>
</tr>
</thead>
</table>
| Susan Lohin  
  Director | Alice M. Hummer  
  Editor |
| Marisa Shariatdoust ’09  
  Associate Director | Lisa Scanlon ’99  
  Associate Editor |
| TBD  
  Assistant Director of Classes | Catherine Grace  
  Associate Editor |
| Leah Driska ’08  
  Assistant Director of Clubs |

<table>
<thead>
<tr>
<th>Finance</th>
</tr>
</thead>
</table>
| Audrey Wood  
  Financial Administrator |
Resources

**Top 5 on the 5th**

- WCAA monthly communication
  - Sent to all class officers
Resources

VConnect

- Self Service Tools or Request Forms
  - Send or request emails
  - Pull Lists
  - Update your website
  - Class logos
  - Print templates
Resources

* **Online Handbook**
  - Job descriptions
  - Recommended constitution
  - Report forms
  - Sample meeting agendas
  - [http://www.wellesley.edu/alumnae/groups/classes](http://www.wellesley.edu/alumnae/groups/classes)
Prepare for Reunion