WELLESLEY BLUEPRINT
CLASS TREASURER TOOLKIT
Dear Class Treasurer,

Thank you for the time, enthusiasm, hard work, patience, ideas, and sense of humor you contribute to this role in support of Wellesley. Your work to expand engagement with all alumnae is critical to our collective mission to support institutional priorities by connecting alumnae to the College and each other.

We are here to work with you to find potential solutions to any challenges you may face and to help you celebrate engagement of every kind.

This BLUEprint Toolkit is meant to serve as a launch pad and a reference point. You will find your role description and helpful tips, as well as links to resources that we will keep updated throughout the year. The toolkit gathers your resources into one starting point, but if you ever have a question, please always feel free to reach out to your key contact in the Alumnae Association. We are happy to help.

On the 5th of each month, we will send you our “Top 5 on the 5th” e-blast. This monthly update contains important pieces of information for all volunteers, messages we encourage you to share with your constituents, and a “High Five” feature of an alumnae group doing something great. You should be proud of the work you do and we want to share your successes with other volunteers! Please send us your stories and tips to help inspire our collective work.

Thank you for all that you do for Wellesley. We look forward to working with you to connect alumnae to the College and each other.

Best regards,

Kathryn Harvey Mackintosh ’03
Executive Director
Wellesley College Alumnae Association
# Table of Contents

- **Wellesley College Alumnae Association Mission** | 4
- **Volunteer Tenets** | 4
- **Role Responsibilities** | 5
  1. Maintain Class Bank Account | 5
  2. Install and Work with Stripe | 5
  3. Set and Adhere to a Class Budget | 5
  4. Facilitate Use of Treasury Funds for Class Gifts | 6
  5. Keep Employer ID Number on File | 7
  6. Fulfill Record & Reporting Responsibilities | 7
  7. Important Dates for Treasurers | 7
- **Resources and Contact Information** | 9
  - Online Resources | 9
  - Conference Calls and Virtual Meetings | 9
  - WCAA Contact Information | 9
- **WCAA Policies and Guidelines** | 10
  - Charitable Donations | 11
  - Non-Discrimination Policy | 11
- **WCAA Staff Contacts** | 13
Wellesley College Alumnae Association Mission

The mission of the Wellesley College Alumnae Association is to support the institutional priorities of Wellesley College by connecting alumnae to the College and to each other. The Association will serve as a lifelong resource to alumnae and will encourage alumnae to contribute to the continued excellence of the College.

Volunteer Tenets

All alumnae volunteers are guided by the Wellesley College Alumnae Association (WCAA) mission. We are always looking for alumnae interested in sharing their time, energy, and spirit as volunteers for Wellesley. The following tenets are designed to guide you in your volunteer role(s).

As a Wellesley volunteer, you agree to:

- Treat all alumnae and staff with respect and civility in person, in email, in print, and on social media.
- Commit to a role that suits your skills and capacity.
- Commit to being inclusive and address issues of diversity along numerous demographic lines (e.g., race, class, gender identity, sexual orientation, ethnicity, age, ability, religion, geography, etc.) in all facets of your volunteer work.
- Communicate regularly with alumnae volunteers and WCAA staff.
- Actively seek opportunities to engage new alumnae.
- Resolve any conflicts in a transparent and open manner.
- Acknowledge any potential conflicts of interest and recuse oneself when appropriate.
- Keep your contact information current at alum.wellesley.edu, including address, email, and phone number. As a volunteer, you must agree to be contacted by the WCAA or other alumnae via any of these channels.
- Recognize that your actions will reflect on and speak for not only you, but for other alumnae and the College.
Role Responsibilities

The class treasurer solicits annual dues from classmates and is responsible for promoting the Class Lifetime Membership program (CLM). It is the treasurer’s responsibility to keep the board fully informed of the state of the class treasury, and to communicate this to the class on an annual basis.

1. Maintain Class Bank Account

The class treasurer and class president should be co-signers on the class bank account. Information about the bank account and class signatories must be kept on file in the WCAA. If you need any documentation to open or document a bank account, such as a letter from the WCAA verifying the non-profit status of the class, its status as a subsidiary 501(c)(3), and the class EIN and supporting documentation, please reach out to your staff contact in the WCAA.

2. Install and Work with Stripe

Stripe is an interface which allows payments and purchases made on your website to go directly to your class bank account. If your class does not use Stripe, anytime a purchase is made or dues are paid on your website, those funds go to the WCAA bank account. WCAA will keep track of the class money, but as treasurer will need to request a check and then wait for the check to be issued and mailed to you. It is far simpler and faster to use Stripe. Setting up your Stripe account.

3. Set and Adhere to a Class Budget

Together with the rest of the class board, the treasurer is responsible for establishing a class budget. Budgets may be set annually or on a five year cycle. When planning, be aware that typically a class should maintain a minimum of funds sufficient to cover transportation expenses for alumnae training such as BLUEprint, other anticipated expenses such as hard copy mailings, and any event costs. It is very important that the treasurer keep accurate records of all treasury matters during their term as well as the records for the previous seven years.
Annual Dues
Class dues are used directly to support class events and to keep costs manageable. Class members pay this fee annually. Dues are deposited directly into the class bank account if the class is using Stripe.

Class Dues Notices
After consultation with the Board, each year the treasurer should send a class dues notice to classmates, typically in a newsletter or email. The notice should explain that class dues are tax deductible. However the dues are used solely to support class activities and do not count as gifts to the College. It is very important to highlight the distinction between dues paid to the class and donations made to the College. Work with the website chair to ensure that the website is set up to allow online dues payment, and be sure to use Stripe so that any membership funds go directly into the class account.

A Class Lifetime Membership (CLM) is a donation which, combined with other CLMs from your class, is used to purchase shares in the Wellesley College endowment on behalf of the class. The investment will pay dividends to the class which can be used to fund class activities such as Reunion. The endowment investment dividends are a wonderful way to grow the class treasury, but they are not tax deductible.

Sources of Expense:

- **BLUEprint Alumnae Volunteer Training:** After the first class Reunion, the class treasury pays for class officers’ transportation expenses to and from BLUEprint, while the Alumnae Association provides accommodations and meals.

- **Mini Reunions:** A portion of class treasury funds may be used to publicize mini reunions. Some classes opt to subsidize the cost of mini reunions or offer financial aid in the form of spirit funds.

- **Class Communications:** While we strongly encourage using electronic communication whenever possible, print communications may be helpful to reach alumnae without emails.

- **Reunion and Record Books:** The class treasury provides seed money for Reunion and the class record book. The treasurer should ensure that funds are set aside for these initiatives as part of setting the class budget. Reunion and the record book must be self-supporting, unless the class officers elect to subsidize some portion of the projects.

  - **The 60th Reunion Class:** After the 60th Reunion, the class treasury is typically turned over to the WCAA to be managed in consultation with the class treasurer.

4. Facilitate Use of Treasury Funds for Class Gifts
The class may elect to add a portion of treasury funds to the total class gift to the College at Reunion. A class vote, in accordance with the class constitution, is necessary to allot funds for
this purpose. When determining the amount of any such gift, class officers should remember that the treasury should maintain sufficient funds to cover officer transportation expenses for BLUEprint, seed money for the next Reunion, and other anticipated expenses.

5. Keep Employer ID Number on File

When a class graduates, the WCAA files an application with the IRS for an employer ID number (EIN) for the class. The IRS assigns each class an EIN, identifying the class as a tax-exempt nonprofit subordinate of the Wellesley College Alumnae Association under the 501(c)(3) tax code. A copy of the certificate is mailed to the original class treasurer who saves it in her files, which are passed on to successive treasurers.

6. Fulfill Record & Reporting Responsibilities

- **Class Financial Records:** The treasurer must keep track of all financial transactions and class life members and record all dues payments made by classmates. They may obtain lists of classmates from the WCAA office to facilitate record keeping. A list of fully paid lifetime members who have been added during the previous fiscal year and a check for the total lifetime dues amount is due to the WCAA each year by June 10.

- **Annual Financial Report:** At the close of each fiscal year on June 30, the treasurer is required to submit a financial report to the WCAA to be kept on file. The form must be completed and received no later than July 15.

- **IRS Form 990-N:** If the WCAA receives the financial report by the July 15 deadline, the WCAA staff will file the federal 990-N form with the IRS in the fall.

- **Audit:** Once the treasurer has closed the books after Reunion in the fifth year, the books must be audited before the handoff to the new class treasurer. The audit does not need to be completed by a professional accountant—a classmate can conduct this audit.

7. Important Dates for Treasurers

- **June 10:** The list of new class lifetime members and a check for all new class lifetime membership funds is due

- **July 15:** Annual financial report due to WCAA

**Note:** In Reunion years only, the outgoing class treasurer is responsible for closing out the books on Reunion by September 1. The annual financial report and IRS form 990-N are still both due on July 15, as the fiscal year still ends on June 30. The treasurer has until September 1 to close out the books on Reunion. Any financial transactions that take place after July 1 are in the new
fiscal year. As such, when transferring the books, the outgoing and incoming treasurers must review these transactions carefully, as the incoming treasurer is responsible for reporting on and accounting for them at the end of that fiscal year.
Resources and Contact Information

Online Resources
Visit our Online Resources page for:

- **Technological Help Form**: Request website help, member lists, labels for mailings, and help crafting emails on behalf of your class/club/SIG.
- **Event Sign-In Template**: A printable sign-in sheet for events.
- **WCAA Email Information**: An explanation of our email policy.
- **Online Directory**: An alumnae directory that is searchable by class, location, career, employer, and much more.
- **Alumni Magnet (website) manual** and video tutorials.
- Much, much more!

Conference Calls and Virtual Meetings

- Schedule a conference or video call via Zoom Meeting. Zoom is an easy, reliable cloud platform for video and audio conferencing, collaboration, and chat, across mobile devices, desktops, and telephones. Reach out to your key contact for login credentials to use the Alumnae Association’s account for your group.

WCAA Contact Information

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Wellesley, MA 02481-8203
781.283.2331
fax: 781.283.3638
www.wellesley.edu/alumnae
WCAA Policies and Guidelines

WCAA List and Email Policies

The Wellesley College Alumnae Association (WCAA) may provide class, club, and shared identity group (SIG) leaders with access to lists of their members upon request. These lists contain information useful to volunteer leaders for planning events, managing communications, and calculating metrics. The information shared in these lists is sensitive data and is provided at the discretion of the WCAA.

The WCAA is unable to include alumnae email data in these lists for many varied reasons, including but not limited to the following:

- The Wellesley College Alumnae Association is a 501(c)3 Nonprofit organization and therefore subject to privacy restrictions including the EU’s General Data Protection Regulation and domestic anti-spam laws. All email communications on behalf of the WCAA and its umbrella organizations are legally mandated to provide an option for recipients to unsubscribe or opt-out of receiving future emails. Private mass emails do not allow direct unsubscription from Wellesley mail and therefore are not permitted. Platforms such as Paperless Post are not tied to the Wellesley database and any unsubscribe requests will not be captured for future communications.

- All broadcast emails to classmates, club members or SIG members should be sent through the WCAA’s official website newsletter function, which is connected to the College’s alumnae database.
  - The College’s records database tracks updates, email accounts that send back mail as undeliverable, and unsubscribe requests. Changes are continuously being made.
  - This ensures that communications are sent to the most current email addresses.
  - For help sending emails, please submit a request here.
  - Personal, one-on-one emails may be sent between alumnae.

- The WCAA offers online directories for all classes, clubs, and SIGs, as well as an all-alumnae general directory, which can be filtered by name, class, state, city, country, current or past employer, job title, or occupation. To access the general directory, please visit https://www.alum.wellesley.edu/people.html. To view your class, club, or SIG directory, please visit their respective websites.
  - Please note: while the online directories provide email addresses for many alumnae, compiling these addresses into a private list, or using them to send mass emails is strictly prohibited.
  - Solicitation emails are not permitted under any circumstances, regardless of the number of recipients.
The College and the WCAA aim to meet industry standards of our institutional peers, and we are committed to safeguarding alumnae information. You may view our full privacy policy here.

While broadcast emails are a useful means of communicating with classmates and club/SIG members, they are just one means of contact. Many groups have had great success by varying their communications between email, print mailings, the Hive, social media, Facebook groups, and in-person events. If you need help reaching a particular individual or group, please reach out to your WCAA staff contact for assistance.

It is the responsibility of each alum to provide the College with any changes in contact information to ensure they are listed correctly. Alumnae can report these changes to recordupdates@wellesley.edu or call our toll-free record updates number at 1.800.339.5233. If you receive news about alumnae contact updates, please let us know.

Charitable Donations
Each Wellesley class/club is a 501(c)(3), a non-profit organization, whose mission is to connect Wellesley alumnae to the College and to each other. Each class/club operates under the umbrella of the Wellesley College Alumnae Association and as such must operate in a manner that upholds the shared mission of the class/club and the WCAA so that both the class/club and the WCAA may maintain their legal standing as non-profits.

While community service can be a large part of a class/club’s engagement, direct financial support of another charity is not permitted. All money collected by the class/club must be utilized to further the mission of the class/club, the WCAA, and Wellesley. In other words, funds raised and held in the class/club's bank account are to be used to connect alumnae to each other, the class/club, the WCAA, and the College or may be donated to the class/club’s scholarship fund, if applicable, or as a gift to the College. Direct financial support of another 501(c)(3) is outside the class/club’s mission, and therefore must not occur.

If you have any questions about a class/club's financial responsibilities, please contact alumnae@wellesley.edu.

Non-Discrimination Policy
Each Wellesley class/club/SIG operates under the umbrella of the Wellesley College Alumnae Association and is closely associated with Wellesley College through the club/club/SIG’s mission to connect Wellesley alumnae to the College and to each other. As such, each Wellesley class/club/SIG is expected to share Wellesley College’s commitment to providing equal opportunity in employment and education to all employees, students, and applicants of Wellesley College. Wellesley College policy strictly prohibits discrimination or harassment on the basis of race, religion, color, sex/gender, age, ethnic or national origin or ancestry, veteran status, physical or
mental disability, pregnancy, sexual orientation, gender identity or expression, genetic information, veteran or military status, membership in Uniformed Services, or any category protected by applicable state and federal laws. Wellesley College is committed to making its programs and campus accessible and compliant with all applicable non-discrimination laws. Sexual harassment, including sexual violence, is a form of gender discrimination that is illegal and prohibited by College policy. Retaliation against any individual for making a complaint regarding this type of conduct or for participating in the investigation of such a complaint, is not tolerated.

If you have any questions about this non-discrimination policy, contact alumnae@wellesley.edu. You can also review the College’s website for more information.
## WCAA Staff Contacts

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<tr>
<th>CLASS YEARS</th>
<th>WCAA CONTACT</th>
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<tbody>
<tr>
<td>1940s</td>
<td>Janet Monahan McKeeney ’88</td>
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<td>1950s</td>
<td>Janet Monahan McKeeney ’88</td>
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<td>1960s</td>
<td>Kelly Gallagher ’14</td>
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<td>1970s</td>
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<td>Emily Rankin Welch ’99</td>
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<tr>
<td>CE/DS</td>
<td>Tulika Verma</td>
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<tr>
<td>SIGS</td>
<td>Tulika Verma</td>
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</tbody>
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### Janet Monahan McKeeney ’88
Senior Director  
jmckeene@wellesley.edu  
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### Kelly Gallagher ’14
Associate Director of Alumnae Engagement  
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