WELLESLEY
BLUEPRINT

SIG PRESIDENT TOOLKIT 2018

WELLESLEY
ALUMNAE

Dear SIG President,

Thank you.

First and foremost, we would like to thank you for your time, your enthusiasm, your hard work, your patience, your energy, your ideas, your sense of humor, and your leadership. You are the driving force and the steadying presence for your Shared Identity Group (SIG). You set the tone by motivating and listening. You lead by trying new events and reaching out to new people, all the while working toward including as many alumnae as possible.

We recognize all the things you do and appreciate them greatly. We are here to help you celebrate engagement of every kind and work with you to find potential solutions to any challenges you may face.

We are excited to share this BLUEprint Toolkit and additional resources with you to support your development as a SIG leader. In addition to formal documents such as roles and responsibilities and sample bylaws, we plan to add content as we learn of exceptional and unique ideas for engagement, volunteer recruitment, and motivation. Please send us your most successful and most creative ideas. We'd love to share them with other SIG leaders to help their SIGs grow and thrive.

We look forward to working with you in all the myriad ways to connect alumnae to each other and to the College.

Best regards,

Lesley Robertson '88
Director of Alumnae Engagement Programs

Janet Monahan McKeeney '88
Director of Alumnae Engagement Logistics

WELLESLEY
ALUMNAE

Table of Contents

Wellesley College Alumnae Association Mission **4**

Volunteer Tenets **4**

Role Responsibilities **5**

Board Meetings **6**

Prior to Each Meeting 6

The Meeting 6

Follow-Up 7

Volunteers **8**

Recruiting Volunteers 8

Motivating Volunteers 9

Events **10**

Communications and Social Media **11**

Newsletters/Emails 11

Website 11

Social Media 12

Access to Contact Information 12

Online Resources **13**

WCAA Policies and Guidelines **14**

WCAA Contact Information **16**

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 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 SIG president* sets the tone for the board and the SIG leadership. Presidents collaborate with a strong board of dedicated volunteers who will be thought-partners to advance the goals of the SIG.

As leader of the SIG, presidents assume the following responsibilities:

- Provide overall leadership and direction to the SIG organization.
- Call and lead board meetings at least three times per year, including one SIG annual meeting.
- Together with the SIG board, establish and communicate goals and priorities for the SIG.
- Structure the SIG board and leadership roles to ensure continuity by providing and fostering opportunities for new leadership to develop.
- Oversee SIG activities with board officers, especially programming and membership.
- Communicate regularly with board officers to ensure they are fulfilling their role responsibilities and offer guidance as needed.
- If applicable, exercise overall financial oversight for the SIG; serve as co-signatory on bank account with SIG treasurer.
- Approve communication plans for the SIG; together with the communications officers (secretary, website chair, newsletter chair) review all SIG press releases, newsletters, electronic communications, and other publications to ensure they reflect the SIG's goals and priorities.
- Maintain regular contact with the WCAA on SIG activities and goals.
- Attend any training sponsored by WCAA to which you are invited, if at all possible.
- Submit an annual report of the SIG's activities to the WCAA by mid-July or immediately following the SIG annual meeting.

** In instances where co-presidents lead the SIG, the same responsibilities are expected. although some may be divided at the discretion of the SIG.*

Board Meetings

The purpose of a board meeting is to plan, discuss, organize, and make decisions for the SIG. With this in mind, SIG presidents are asked to consider the following information when organizing a board meeting:

- Set meeting dates for the full year in advance. Discuss the regularity of meetings to determine what will achieve the goals of the group.
- Vary times of day, days of the week to offer flexibility and allow more members the opportunities to participate.
- Arrange for various methods to participate in a meeting, for example via phone, Skype, Google Hangout, FaceTime, etc.
- Set an agenda and timeline and keep to it.

Prior to Each Meeting

- The president should contact chairs who are responsible for presenting reports well ahead of the meeting to allow for preparation.
- Create an agenda; compile necessary factual information, etc.
- Plan the order of business strategically placing items in order of importance.
- Allocate an appropriate amount of time for committee reports and include it on the agenda. Inform committee chairs in advance how much time they will have for their presentation and set an end time to follow-up discussion.
- Distribute the agenda and minutes of previous meeting one to two weeks ahead of the meeting to serve as incentive to think about items before the meeting.

The Meeting

- Start on time.
- Be familiar with simple parliamentary procedure – it provides confidence to help run the meeting, and will assist the flow of business.

- Give everyone a chance to be heard, but do not let any single person monopolize the discussion.
- Set meeting goals and be sure that the meeting accomplishes something. Even if a decision is postponed to await further research, the meeting has started the decision process. Don't let items drift on inconclusively.
- With the board, set next steps and assign them clearly.
- End the meeting on time.

Follow-Up

- Appoint appropriate chairs/committees as necessary.
- Call/email board members tasked with next steps to encourage and remind them of next steps and deadlines.

When you are president, the board and other alumnae are looking to you for leadership. So, lead. Don't worry, it's a friendly audience who want you to succeed. At the same time… listen! Do not become enamored with your own fabulous ideas. That's why you have a board. Get their opinions, and pay attention.

Helen Kris Marshall '76

Volunteers

Every organization is as strong as the people involved in making it work. The effort to recruit and retain volunteers is worthwhile. Volunteering is rewarding, and many people make time to do it, even when faced with a busy schedule. There are many alumnae who would be happy to volunteer for Wellesley and your SIG. The challenge lies in finding them and determining the jobs that will provide the best "fit" for each volunteer.

Recruiting Volunteers

- The first rule of finding volunteers is … ask!
- Talk about volunteering for the SIG in conversation at events.
- Provide your members an opportunity to sign-up for volunteering anywhere you can think of—on SIG forms, at events, on the website, through social media, etc.
- Break jobs into smaller concrete pieces; alumnae are often more willing to volunteer for a job if it is a specific task with a defined amount of time. After success, volunteers are often willing to take on tasks and roles with more responsibility.
- For board positions, consider offering co-chair roles—it splits the job in half. (Even the presidency can be a shared position.)
- Make sure your nominating committee is comprised of alumnae of diverse ages, geography, interests, and socio-economic backgrounds.
- Let volunteers know that serving on a board or in a volunteer position is an honor and will be looked upon with high regard.

Motivating Volunteers

- Leaders set an example by their enthusiasm for the SIG and SIG activities.
- Delegate responsibilities, especially to the board. One person cannot do it all.
- Your board is invested in the SIG; when people feel they are an important part of the project they feel an increased commitment to it.
- Pair experienced volunteers with new ones.
- Try to give volunteers assignments for which they have an aptitude and will enjoy.
- Encourage volunteers to take on more SIG responsibilities in areas in which they have personal connection or interest.
- As president, support SIG volunteers in what they are trying to do. Praise and thank them personally and at board meetings.

One of the keys to a successful project is that the team members enjoy working with each other. If you bond as a team, you look forward to working together, and you never want to let the others down. This is pretty important if you aren't getting paid! Working with other Wellesley alums has been a great experience.

Charlotte LaRusse Isaacs '68

Events

The magic happens when Wellesley alumnae get together to share meals, celebrate, learn, connect, embody Sed Ministrare, and pass Wellesley spirit to new generations of Wellesley women. There are so many possibilities for gatherings, and some ideas are listed below.

- Working with the board and regional representatives, brainstorm possible events for the year. Determine if they will be pilot events, SIG specific events, or collaborations with a single club or across several clubs.
- Aside from an annual meeting, the SIG is not required to have any specific type of event.
- There is no defined minimum number of events a SIG must hold. If it is challenging to find support for the number of planned events, do fewer and do them well.
- Ask for program interest and specific topics/ideas from your board or conduct a survey asking what type of events your SIG's constituency is interested in and would support. Don't forget to ask if an alumna would help with an event she has suggested!
- Collaborate with other SIGs, club and class leaders, decade reps, geographic reps to share ideas and do programming together.
- Keep timing in mind. Make sure there is enough time for planning and publicizing the event, and that it will take place at a time that is convenient for SIG members.
- Use the registration system provided by WCAA on alum.wellesley.edu to help the WCAA record accurate attendance and engagement metrics. For more information on creating events on your website, view our video tutorials.

Event Ideas:
Book clubs, brunch, community service, admission events, holiday events, making care packages for students, lunch, tea, happy hours, spotlights on local alumnae events, and any other great ideas you and your board may have.

Communications and Social Media

You have the power to connect—and build excitement about all the connections that are possible through the SIG. Let alumnae learn about upcoming events and share photos of past ones! Add personal touches as you introduce the board—what are their favorite books/movies/restaurants? Or perhaps a spotlight on one in each newsletter—how did they come to volunteer and why?

Newsletters/Emails

- Together with the communications leader, establish a timeline for regular communication to the SIG via email or newsletter including deadlines for members to submit information.
- Be consistent in the information you include in newsletters.
- Send all SIG emails, newsletters, and invitations through the SIG website (alum.wellesley.edu). Training for communications volunteers is available online. If your email requires additional technological assistance, you may use this form to request an email blast, newsletter, labels, or list.
- The WCAA encourages email and e-newsletters for sustainability and suggests mailing only to alumnae with no email on file. If a print mailing is necessary, be sure to include a way for alumne to update their information: "Update your contact information at alum.wellesley.edu or email recordupdates@wellesley.edu."

Website

- Ensure your website has current content on it. Post a welcome letter, information about upcoming events, list your officers, add a banner photo, include photos to highlight events. If you and your website chair need assistance, request it here or view our video tutorials.

Social Media

- Please post the WCAA social media guidelines on the SIG website and any social media platform your SIG uses.
- Ensure there are moderators for each platform, and that they understand and adhere to the social media guidelines.

Access to Contact Information

- WCAA strongly encourages use of the online alumnae directory. The online alumnae directory is behind a Wellesley firewall that requires signing in. If alumnae have difficulty logging in, they can call the help desk at 781-283-7777 or email them at help@wellesley.edu. They can also use the password reset feature.
- If you wish to do individual outreach to alumnae to encourage attendance and other participation, you can request a SIG list here. A SIG list will include: name, addresses, and phone number. A lost list will include name and last known address. A do-not-contact list will include name. You can preview an example of a list here.
- We do not recommend a printed directory, as it is quickly out of date. All information and search functionality is available in the online directory found either on the WCAA website or the individual SIG website. If your SIG requires a directory, you may request one in the comments of this form. Please be aware that pulling a directory is time intensive. The WCAA cannot produce directories in the summer months or in January. The WCAA will produce one directory annually for your SIG if requested and both the SIG annual and financial reports have been completed and submitted.

Online Resources

Here are direct links to other helpful resources:

- Technological help form for email, eblasts, lists, and labels
- Online directory
- Basic parliamentary procedure
- Sample bylaws
- Toolkits for other roles
- Alumni Magnet video tutorials:
    - Creating an Event: https://youtu.be/qHNuHTsuzQA
    - Managing Your Event: https://youtu.be/NHQ24JV9-yc
    - Creating a Newsletter: https://youtu.be/SEbwj9Ov3bg
    - Creating Memberships: https://youtu.be/pP3MVYAAJDs
    - Managing Your Online Store: https://youtu.be/ewdRteV6tFI

WCAA Policies and Guidelines

Appropriate Use of Alumnae Information

Current alumnae volunteers may be given access to alumnae information. The information provided is for official Wellesley College alumnae use only. Use of the information for any non-Wellesley College Alumnae Association purpose - including but not limited to solicitation of any kind; reproducing and storing in a retrieval system by any means, electronic or mechanical; photocopying; or use of the addresses or other information for any mailing other than alumnae related events - is strictly prohibited. Any misuse of the data may result in legal action from the Wellesley College Alumnae Association.

The information provided is maintained by the Wellesley College Alumnae Association database and is accurate as of the date it was retrieved.

Wellesley College takes seriously its responsibility to protect the privacy of the members of the Wellesley College community. We have recently updated our Privacy Notice, which should make it easier for you to understand what information we collect, why we collect it, and how it's used

If you have any questions about appropriate usage of either alumnae information, contact alumnae@wellesley.edu.

Charitable Donations

Each Wellesley class/club/SIG 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/SIG 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/SIG and the WCAA so that both the class/club/SIG and the WCAA may maintain their legal standing as non-profits.

While community service can be a large part of a class/club/SIG's engagement, direct financial support of another charity is not permitted. All money collected by the class/club/SIG must be utilized to further the mission of the class/club/SIG, the WCAA, and Wellesley. In other words, funds raised and held in the class/club/SIG's bank account are to be used to connect alumnae to each other, the class/club/SIG, the WCAA, and the College or may be donated to the class/club/SIG'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/SIG's mission, and therefore must not occur.

If you have any questions about a class/club/SIG'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 class/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 Contact Information

Wellesley College Alumnae Association
106 Central Street
Wellesley, MA 02481-8203
781-283-2331
fax: 781-283-3638
www.wellesley.edu/alumnae

Alumnae Engagement Team

Janet Monahan McKeeney '88, Director of Alumnae Engagement Logistics
jmckeene@wellesley.edu
781-283-2333

Lesley Robertson '88, Director of Alumnae Engagement Programs
lrobert3@wellesley.edu
781-283-2334

Kelly Gallagher '14, Assistant Director of Alumnae Engagement
kgallag2@wellesley.edu
781-283-2321

Darcy Kupferschmidt '12, Assistant Director of Alumnae Engagement
dkupfers@wellesley.edu
781-283-2332

Tulika Verma, Assistant Director of Alumnae Engagement
tverma@wellesley.edu
781-283-2343

WELLESLEY COLLEGE ALUMNAE ASSOCIATION | 106 CENTRAL STREET | WELLESLEY, MA 02481