

**WHEATON COLLEGE**

**REGIONAL  
VOLUNTEER HANDBOOK  
2004-2005**

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**WHEATON**

**REGIONAL**

**CLUBS**

## **WHAT IS A REGIONAL CLUB?**

Wheaton Regional Clubs have existed almost as long as the Alumnae/i Association itself. Regional clubs are formed where there is a geographical concentration of alumnae/i and where common activities can be organized. Regional clubs are open to all alumnae/i, parents and friends of Wheaton College. The Alumnae/i Association strongly encourages regional clubs to reflect the diversity of its alumnae/i population in its leadership and programming efforts.

Wheaton regional clubs exist to:

- foster a sense of association between alumnae/i and the College;
- provide opportunities within geographic regions for fellowship among alumnae/i, current students, parents and friends of the College;
- create a Wheaton presence within a community;
- encourage alumnae/i of all generations to maintain contact with Wheaton and to build a sense of pride in and understanding of what Wheaton is today;
- create opportunities to develop positive relationships between alumnae/i and current students; and
- promote alumnae/i commitment to Wheaton's educational mission by encouraging volunteer assistance for its admission (APAC), career services (Filene Center), public relations and fund-raising efforts (Annual Fund).

## **REGIONAL LEADERSHIP STRUCTURE**

Volunteers are the backbone of your club. You'll need an adequate number of volunteers to carry out your planned activities and to effectively communicate with alumnae/i in your region. If you develop a structure that is deep at the committee level, you'll have a natural pipeline of volunteers to bring up the leadership ladder.

All it takes to form a new club is one or two people who are interested in regional activities and who are willing to assume leadership responsibility in the beginning. Some clubs are kept alive by the selfless commitment of one or two volunteers. **However, to ensure that your club develops future leaders, it is important to delegate responsibilities and to include others in both the planning and implementation of events and activities.** Also, we recommend that you include APAC and Filene Center Liaison volunteers in regional planning. Recruiting and utilizing a range of volunteers is one of the biggest ongoing challenges for all Wheaton regional clubs.

The leadership structure of regional clubs varies from region to region. In general, clubs should develop clear job descriptions and an orderly means for rotating volunteer leaders. **Regional coordinators should make every effort to identify their successors during the course of their term.** It is often helpful to form a Steering Committee to help share the responsibilities and to increase the number of alumnae/i involved.

The Alumnae/i Association offers the following suggestions for possible Steering Committee structures based on the experiences of past regional clubs and volunteers. The size and structure of Steering Committees will vary by region.

### **REGIONAL COORDINATOR**

The Regional Coordinator is appointed by the staff in Alumnae/i Relations & Annual Giving, often in consultation with the past Coordinator, and serves a specific term as determined by the staff and regional representatives. The Regional Coordinator:

- serves as the primary link between the regional club and the College
- shares all club communications with the Office of Alumnae/i Relations & Annual Giving
- completes an evaluation form after each regional club event
- convenes and chairs committee meetings
- coordinates activities with the APAC Chair and Filene Center Liaisons, as needed
- attends volunteer training sessions offered by the College
- makes a gift to the Annual Fund that reflects his/her own resources and commitment to Wheaton as a philanthropic priority
- completes an Annual Report Form and submits it to the Office of Alumnae/i Relations and Annual Giving by mid-July each year

## **ASSISTANT OR CO-REGIONAL COORDINATOR**

The Assistant or Co-regional Coordinator is appointed by the Regional Coordinator in consultation with the Office of Alumnae/i Relations & Annual Giving and succeeds the Regional Coordinator at the end of her/his term. The Assistant/Co-regional Coordinator:

- presides over meetings in the Coordinator's absence
- assists the Coordinator in organizing and implementing all regional club events and activities
- makes a gift to the Annual Fund that reflects her/his own resources and commitment to Wheaton as a philanthropic priority

## **SECRETARY/TREASURER**

The Secretary/Treasurer is appointed by the Regional Coordinator. The Secretary/Treasurer:

- records minutes at all committee meetings
- collects and submits address, phone and e-mail updates from regional participants
- collects dues and maintains an accurate accounting of any funds
- records reservations and money for regional events
- maintains a bank account in the club's name and preserves the club's financial records
- records attendance at regional events
- makes a gift to the Annual Fund that reflects his/her own resources and commitment to Wheaton as a philanthropic priority

## **REGIONAL ALUMNAE/I PARENT ADMISSION COMMITTEE (APAC) CHAIR**

This Chair is appointed by the Assistant Director of Alumnae/i Relations & Annual Giving for APAC, in consultation with the Admission Office and the Regional Chair. The APAC Chair:

- coordinates admission and recruitment activities within the region and delegates tasks to APAC members as appropriate, including college fair attendance, telephone contacts, high school visits, and off-campus interviews
- reports to the National APAC Chair
- facilitates the involvement of the members of the regional club in prospective or accepted student events when appropriate (e.g., summer send-offs)
- recruits new APAC members
- makes a gift to the Annual Fund that reflects her/his own resources and commitment to Wheaton as a philanthropic priority

## **FILENE CENTER LIAISONS**

The appointment is made by the Filene Center Associate Director, in consultation with the Regional Coordinator and the Office of Alumnae/i Relations & Annual Giving. The Filene Center Liaison:

- collaborates with the Filene Center to address the career development needs and interests of current Wheaton students (i.e., January internships, networking, etc.)
- coordinates responses to requests for career-related information, including alumnae/i who have offered to serve as contacts
- makes a gift to the Annual Fund that reflects his/her own resources and commitment to Wheaton as a philanthropic priority

## **OTHER POSSIBLE POSITIONS**

Additional opportunities for Steering Committee involvement include:

- Newsletter Editor
- Program/Events Chair
- Young Alumnae/i Activities Chair
- Webmaster/E-blast List Manager
- Host or facilitator of sponsored events
- Photographer at events to provide photos for possible publication in the *Wheaton Quarterly*, in club newsletters, or on club Web sites

## **THE ROLE OF THE OFFICE OF ALUMNAE/I RELATIONS & ANNUAL GIVING**

The office of Alumnae/i Relations & Annual Giving (ARAG) coordinates and supports both on- and off-campus events and activities of Wheaton alumnae/i, parents and friends. The ARAG staff serves as the liaison between the regional clubs and the Alumnae/i Association and works closely with the National Regional Chair.

The staff in Alumnae/i Relations & Annual Giving is committed to supporting all Wheaton regional clubs and can assist them in the following efforts:

- organizing regional steering committees and planning regional events;
- organizing on-campus workshops during Alumnae/i Leadership Conference/Homecoming weekend to provide training and guidance for regional volunteers;
- identifying representatives from the College community to participate in regional programs;
- maintaining a database of alumnae/i addresses and biographical information;
- providing computer lists or downloads of alumnae/i by zip code (lists and downloads can also be provided in alphabetical order by class year and with e-mail addresses);
- providing mailing labels of alumnae/i by zip code;
- covering the cost of 2-3 regional club mailings per year (newsletter, invitation or flyer), depending on the size of the club's constituency;
- visiting regional associations and communicating regularly with regional volunteers;
- providing advice and ideas at any time.

As a member of the Alumnae/i Board of Directors, the **National Regional Chair** serves to provide the formal connection between the regional associations and the Alumnae/i Association. The National Chair:

- serves a three-year term on the Alumnae/i Board of Directors;
- updates the Alumnae/i Board on the progress and plans of Wheaton's regional associations;
- assists in planning and facilitating a workshop for regional volunteers during the annual Alumnae/i Leadership Conference;
- serves as the liaison between regional volunteers and the College through post-event debriefings and regular communications;
- encourages and supports regional volunteers to share their programming successes through alumnae/i publications, including the *Wheaton Quarterly*;
- makes a gift to the Annual Fund that reflects her/his own resources and commitment to Wheaton as a philanthropic priority.

**ALUMNAE/I RELATIONS & ANNUAL GIVING STAFF  
FOR REGIONAL SUPPORT**

<b>NAME/TITLE</b>	<b>PHONE NUMBER</b>	<b>E-MAIL ADDRESS</b>
Sharon Howard '87, Director	508-286-8207	showard@wheatonma.edu
Heather Corbett '86, Associate Director Clubs & Regional Activity	508-286-3423	hcorbett@wheatonma.edu
Debby Karol Administrative Assistant Alumnae/i Relations	508-286-3422	dkarol@wheatonma.edu
Betty Polk Administrative Assistant Alumnae/i Relations & Annual Giving	508-286-3526	bpolk@wheatonma.edu
Ann Robinson Administrative Assistant Alumnae/i Relations	508-286-3421	arobinso@wheatonma.edu

**EVENTS**

**AND**

**PROGRAMMING**

## **PLANNING A CLUB EVENT**

Regardless of how many or what type of events your club may plan, it is a good idea to establish S.M.A.R.T. (Specific, Measurable, Attainable, Realistic, Time-Based) goals to help you manage the club on a day-to-day basis. Establishing clearly-defined goals upfront will help the Alumnae/i Relations & Annual Giving Office plan ahead to meet the needs of your club. Without these goals, your club will most likely struggle to determine priorities, set budgets, and follow through on plans. You may want to think about an annual event-planning meeting at the start of each year as a way to recruit and involve volunteers.

In the earliest stages of your event planning, answer these three main questions:

1. **WHO** do we want to attend the event?
2. **WHAT** is the nature of the event?
3. **WHERE** should it be held?

### **REASONS TO ATTEND CLUB EVENTS**

- meet new friends and renew old friendships
- hear first hand from Wheaton faculty, staff and students
- provide scholarship money for the Alumnae/i Scholarship Fund
- participate in social, educational, cultural, or community service events and activities
- keep in touch with Wheaton College
- enjoy “behind the scenes” tours at local sites

### **THINGS TO CONSIDER WHEN PLANNING CLUB ACTIVITIES AND EVENTS:**

- Determine the purpose and goal of each program
- Vary the types of events you plan (professional, social, civic, cultural, etc.) and the audience you’re trying to reach (new students, young alumnae/i, families, etc.)
- Focus on the quality—not the quantity—of your events
- Analyze the best time of year, time and day of week, and location of events
- Study the interests and demographics of alumnae/i in your area. Are you offering the types of programs your membership will want to attend?
- Provide a Wheaton presence with the Wheaton banner, nametags, speakers, etc.
- Review the strengths and weaknesses of last year’s programs. Keep in mind the feedback you received from your members.
- Thorough planning is essential to successful events.

## **PROGRAMMING IDEAS**

- Faculty/staff speaker
- Wine-tasting event at a local winery or at the home of an alumna/us, or beer-tasting event at local micro-brewery
- Reception in January for students who return to the region for the holidays and/or for those students who have an internship in the region; create a first-hand opportunity for alumnae/i to learn about Wheaton today from the alumnae/i of tomorrow
- Event highlighting the accomplishment(s) of Wheaton alumnae/i who reside in the region
- Reception at a local museum or gallery (even more attractive if a Wheaton alumna/us is one of the artists), or other arts/entertainment activities (theatre, music, etc.)
- Athletic events or outdoor activities
- Career/networking breakfasts or luncheons
- Community service projects
- Family outings
- Summer send-offs for new and returning students

## **ORGANIZING A CLUB EVENT**

A Wheaton club event is an opportunity to have fun, meet new people, learn about interesting subjects, and show support for the college. Although organizing an event takes some work, it should not be a formidable undertaking. It is also one of the best ways to develop leadership skills and can be used as a “rite of passage” for movement up the leadership ladder.

Successful club events will reflect the interests of club constituents and the general character of the club’s surrounding city or geographic area. **Ideally, club leaders should meet in late spring/early summer to plan the following year’s program of events and then announce it in advance (i.e., late summer/early fall), so that alumnae/i can plan to attend.**

As part of your planning:

- Identify dates for traditional events, such as a summer send-off, the club’s “signature” event, a holiday gathering, a spring faculty event with admitted students, etc.
- Review the strengths and weaknesses of the prior year’s program to avoid repeating events that were unsuccessful.
- Identify a chair or co-chairs for each event, and team experienced volunteers with those less experienced.

Your regional staff contact in the office of Alumnae/i Relations & Annual Giving can help your club with:

- Event ideas
- Location and planning tips
- Attendance strategies
- Succession planning
- Advice and consultation on club requirements
- Mailing procedures and labels
- Faculty and administrators as speakers
- Expenses for faculty and administrative speakers, including transportation costs, lodging, and meals (once per year)

## **BEFORE THE EVENT**

**Decide on a date, time, place, and price for your event early.** It can take longer than expected to plan an event and find an appropriate, available meeting site—two or three months is not unusual. You will need to discuss the event’s cost with other members of your committee. If you would like to engage a college speaker for your event, you will need to initiate a request to the Alumnae/i Relations & Annual Giving staff as soon as possible—ideally no later than three to four months prior to the desired date. Also, you’ll want to obtain biographical details (education, work history, hobbies, etc.) on the speaker well before your event. All of this information should go into your event announcement.

**Publicize it.** Try these simple ideas to draw larger audiences to your events:

- use an e-mail list to announce events and to send reminders
- use a club Web page to announce events (club Web pages are hosted by the Alumnae/i Association on the Wheaton server. See page 21 for more.)
- prepare a schedule of upcoming events; mail it in advance and also distribute it at each event
- feature a local alumna/us who is a recognized leader in his or her field
- involve a member of the Wheaton faculty or a senior administrator, and choose a current topic of national or world importance
- plan activities with other university/college clubs, or open an event to the public

**Establish a back-planning calendar.** Once you’ve set a date for the event, create a planning calendar and “to do list” in reverse chronological order, beginning from the event date. In general, you will need 10-14 weeks to plan a successful event. (This could be longer for a special event or if a speaker is involved.) Here is a sample calendar:

- Event date
- Final count due to venue 3-5 days prior to event date
- RSVP deadline 3-5 days prior to final count due date
- Invitations received 4-5 weeks prior to RSVP deadline (allows people time to consider the event, clear their calendars, and respond by the deadline)
- Mail date 1 week prior to desired receipt date
- Information gathering 1-2 weeks prior to printing
- Printing/ mailing procedures 2 weeks prior to mailing

## **CREATING AND SENDING YOUR EVENT ANNOUNCEMENT**

Create an invitation or announcement that will **SELL YOUR EVENT**. The announcement is your big chance to make your event attractive to prospective attendees. Be creative, as well as informative.

**Stress the event's benefits.** Is it educational, informative, relaxing, thought-provoking, a chance to make new friends or broaden horizons? Will it be held at a special location? **Think of your audience.** Why would the event be of interest to a young or a more senior alum? Is the event aimed at families or individuals? Many Wheaton alumnae/i change careers or interests after only a few years, so broader appeal is often better than a narrow focus. Graphics—photos or artwork—also help sell your event.

The following information should be included in EVERY announcement:

- **TITLE**—Make it catchy to capture people's interest.
- **WHAT**—If it is not self-explanatory, write a brief description of the event and its benefits.
- **WHERE**—Give the address of the event's location, including specific room, if known. A small map can be helpful. In some cases, there is not enough space for detailed instructions and you will want to send follow-up directions or a map to people who sign up.
- **PRICE**—Listed price should include all costs. Consider a young alumnae/i discount, if possible.
- **RSVP**—Provide a deadline for response. If you will need to send follow-up information (e.g., a map or tickets), ask registrants to include a self-addressed stamped envelope (SASE) with their response. This is for your convenience, and it keeps costs down. Don't forget to include the mailing address.
- **CONTACT FOR FURTHER INFORMATION**—Include your name, class year, work and/or home phone numbers.

Design and send your event announcement to the club newsletter editor or your staff contact by the printing deadline date. All event invitations and newsletter submittals should be typed, word-processed, or sent on disk. To minimize the number of phone calls you may have to return as people respond, you may want to change your personal answering machine message temporarily to provide an event date or details (e.g., "If you are calling about the Wheaton event, plenty of room is still available, leave name/phone/address and number of attendees," etc.)

## **LOCATION**

**Be creative** when selecting a location for your event. Consider using a location that is not typically accessible to the general public. People enjoy going somewhere they haven't been before, or where they normally couldn't go on their own. Consider using a facility that already has entertainment or a focus built into it, such as a winery, museum, aquarium, historic site, performing arts facility, or culinary academy. Check to see if any of your committee members or alumnae/i constituents belong to private clubs or have access to any unique facilities through their businesses. You might be surprised at the wealth of resources in your own backyard! Keep track of suitable, interesting sites/venues for future events.

Be certain to determine all costs involved when using any facility, and ask for a written confirmation of all agreements.

If the event involves a speaker or speaking program, ensure that the room is private and away from outside noise.

## **ATTENDANCE**

If your attendance numbers seem low, **phone calling** is an effective way to encourage people to attend. Set up a phone tree with members of your committee. Sometimes alumnae/i just need a little encouragement or a reminder of an upcoming program. **E-mail is also an effective tool to help boost attendance.**

If you are having attendance problems consistently, consider the types and suitability of events you are planning. Do your events appeal to couples, when you have lots of families or singles in your group? Are all events held in one part of your regional area? Are your programs too expensive? Are your invitations arriving five to six weeks in advance of your programs to give alumnae/i adequate notice? Brainstorming with your committee might give you ideas, or **you might survey your members about their interests.** A sample survey appears elsewhere in this handbook. Consider using e-mail to survey your alums. (See **Appendix C** for survey and other resources.)

Designate a "hospitality" committee or person to greet new members and introduce them to others at your events. This will make participants feel welcome, and they'll be more likely to attend future events.

Keep track of contact information for everyone who signs up for your event. You may have to contact them in the event of a cancellation or a last-minute change in time or place.

## **DURING THE EVENT**

Have someone welcome attendees as they arrive, record their names (a sign-in sheet will suffice) and confirm payment. Have membership information/forms available to recruit new members. Provide nametags and pens; they help to break the ice. The College can provide Wheaton nametags.

If you are having a speaker, determine who will host the speaker and introduce her/him to various guests.

Before the presentation, warmly introduce the speaker/host to the audience. (Ask the speaker for information about him/herself beforehand. Usually, a few highlights from the speaker's biography, in addition to some informal comments that relate the speaker or topic to the group, are better than an exhaustive narrative of the speaker's history.)

After the talk, leave about 20 minutes for questions and answers, but end the session earlier if questions taper off or the hour is late. (Don't embarrass the speaker by making him or her do it.)

Finally, thank the speaker on behalf of the club, and consider presenting a gift or token of appreciation. Don't forget to introduce Wheaton staff if they are present, and offer them the opportunity to say a few words.

Take photographs to include in your club newsletter, to post on your club's Web site, or to advertise the event again in the future.

Thank other volunteers, and announce future activities.

## **AFTER THE EVENT**

Send the Secretary/Treasurer all checks, expense invoices/receipts, and a note with the following information: name of event, number of attendees, total income received, number of checks enclosed, and itemized expenses.

Send follow-up letters of thanks to your guest speaker/host and others; one of your or the Club's future activities may depend upon their goodwill.

Send the list of attendees to the appropriate committee member and to your staff contact in the office of Alumnae/i Relations & Annual Giving for future reference. Attendee lists represent a potential pool of volunteers and future leaders, and they also highlight the popularity of various events.

**Update your staff contact on details of the event**, including the event name, number of attendees, how the speaker was received, and who served as the contact for the event. Providing your leadership with the details as you go will help them to compile data at the end of the year for annual reporting. (See **Appendix B** for a sample evaluation form.)

## **ONE FINAL SUGGESTION**

Keep detailed records about all aspects of your event. Good, accurate records not only reduce last-minute uncertainties and problems, but also provide valuable information for the chair of the next event. Get your committee together for a post-event evaluation and discuss what worked, what didn't work, and what you might do differently the next time. Good, consistent planning and evaluation will result in top-quality, successful events time and time again.

## **SAMPLE CALENDAR OF EVENTS**

### SUMMER:

- Steering Committee meeting – Set goals/establish calendar of events
- Summer send-off for new and returning students, their families and alumnae/i to welcome first-year students to Wheaton

### FALL/WINTER:

- Young alumnae/i event—monthly Happy Hours begin
- All-alumnae/i event—faculty lecture at Museum of Fine Arts
- Family event—apple picking

### SPRING:

- All alumnae/i event—Boston Red Sox game
- All alumnae/i event—community service project
- Steering Committee Meeting—review events of the past year

## **WAYS TO INCREASE YOUNG ALUMNAE/I INVOLVEMENT**

Young alumnae/i are generally considered to be those who have graduated within the last decade. Many club coordinators find it challenging to engage young alumnae/i in club activities. Here are some suggestions for ways to increase the interest and involvement of young alumnae/i in Regional Club activities:

- appoint a Young Alumnae/i Activities Chair to the Steering Committee
- offer a small admission reduction to young alumnae/i, or plan free events
- create and distribute a survey to poll young alumnae/i and plan events best suited to their interests (online surveys work best for this population)
- advertise Regional Club events by e-mail or on your club's Web page
- host an annual "Welcome to the Region" event for recent graduates and other alumnae/i new to the region
- involve young alumnae/i in the planning, marketing and implementation of events (word-of-mouth and personal invitations will increase overall attendance)
- create eye-catching invitations with light-hearted graphics—not too serious
- send e-mail announcements and reminders of events

Some of the more successful young alumnae/i events include:

- happy hours (or other strictly social events)
- career or networking events
- sporting events or outdoor activities
- community service opportunities
- events related to current "hot topics"
- events combined with young alumnae/i from other colleges

**NEWSLETTERS**

**AND**

**WEB PAGES**

## NEWSLETTERS AND WEB PAGES

In addition to invitations and event announcements, a newsletter and Web pages are great ways to communicate with your regional constituency. Content and length varies by club, as well as by season, but a typical newsletter or Web page may contain:

- upcoming calendar of events
- articles about recent events
- profiles of area alumnae/i
- news from the college
- information about volunteering for your regional club or Wheaton College
- scholarship fund raising plans or community service efforts
- Steering Committee member contact information
- alumnae/i honors, awards, and achievements
- regional statistics
- general information about your region

**See sample Web pages on the following pages.** To see more examples of class and club Web pages, go to [www.wheatoncollege.edu/alum/class](http://www.wheatoncollege.edu/alum/class).

The Office of Alumnae/i Relations & Annual Giving supports regional clubs by providing address labels and postage for **up to three** regional mailings per year. The staff appreciates the opportunity to review these mailings prior to production for the correct spelling of alumnae/i names and accurate class affiliations, as well as for editing if necessary.

Steps to follow to ensure the timely production and distribution of your regional newsletter:

1. Please plan ahead and allow the Office of Alumnae/i Relations & Annual Giving at least two weeks to edit, copy, prepare and mail all invitations or newsletters.
2. Please e-mail as an attachment or fax a draft copy of any invitation or newsletter to the Office of Alumnae/i Relations & Annual Giving at [hcorbett@wheatoncollege.edu](mailto:hcorbett@wheatoncollege.edu) or (508) 286-8268.
3. All camera-ready copies may be sent to the Office of Alumnae/i Relations & Annual Giving for reproduction and mailing.

# **FINANCIAL MATTERS**

## **FINANCIAL MATTERS**

### **DUES PROGRAMS**

Regional clubs are encouraged to establish financial independence through the collection of voluntary contributions (a “dues program”) on an annual basis. This money is collected in the club’s treasury and can help to finance costs associated with events. Dues should not be so large that they detract from or compete with annual giving to Wheaton. A dues program can also help identify potential alumnae/i volunteers in the area.

Expenses can also be met by charging a specific dollar amount for each event. Keep in mind that cost may be a deterrent to some alumnae/i, so be sure to make clear on all invitations and marketing materials what the cost covers, and consider a discount for younger classes.

### **COSTS ASSOCIATED WITH EVENTS AND NEWSLETTERS**

The College will cover the costs associated with 2-3 regional club mailings per year, depending on the size of your club’s constituency.

The College will also pay for reasonable travel expenses incurred by faculty, staff and/or students who play a major role in regional club events. Approval must be granted by your staff contact **prior to the event being confirmed or publicized**.

Each regional club event should be self-supporting and paid for by reservations, in advance, whenever possible. The club is responsible for estimating and establishing an admission fee to cover the expenses incurred.

The College recognizes that it might be necessary to underwrite the start-up of new regional groups, to provide front money that might be required by established groups for deposits or advance ticket purchases for particular events, or to subsidize in general, on a limited basis, some regional activity. This flexibility is important to the success of the regions and is administered on a case-by-case basis.

### **FUND RAISING PROJECTS**

Many regional clubs have taken on fund raising projects to support the Alumnae/i Scholarship Fund. All alumnae-initiated fund raising projects must support the goals of the college and the Alumnae/i Association and complement the fund raising efforts of the college’s Annual Fund and overall development operations.

## **ESTABLISHING A BANK ACCOUNT**

Your class Treasurer should maintain a class bank account at a local bank. Savings accounts are sometimes preferred to checking accounts to avoid service charges. With a savings account, the Treasurer can transfer funds into his/her personal checking account, and pay class expenses from there.

Accounts should be established in the class name with the Treasurer having authority to authorize transactions. It is optional whether you choose to add an additional person (often another class officer) to have authorization rights. Make sure if you choose this option, the additional name is not required to conduct transactions. The second person is solely a back-up in case the Treasurer is unable to sign.

The Treasurer should keep all receipts, as well as make copies of all invoices and checks, and record them in your Treasurer's record.

## **GUIDELINES FOR FILING A REGIONAL CLUB TAX ID NUMBER**

These instructions apply only to those Regional Clubs who currently do **not** have a tax ID number. Check with previous club leaders (if applicable) to see if a number exists.

1. Obtain an SS-4 Application for Employer Identification Number form from your staff contact or your local bank (a sample form is included in this section.)
2. Fill out the form, listing the name of the applicant as Wheaton College “Name of Regional Club” (e.g., Wheaton College Connecticut Club).
3. On line 3, “Executor, trustee, ‘care of’ name”, you enter YOUR NAME.
4. Lines 4 and 4a should be completed using YOUR HOME ADDRESS.
5. Lines 5 and 5a should be completed using WHEATON COLLEGE/NORTON, MA 02766.
6. Lines 6 and 6a should list YOUR COUNTY/STATE.
7. On line 8a, check “other Non-profit organization,” and list as College Regional Club.
8. On line 8b, enter N/A.
9. On line 9, check “Other,” and list as Club Treasurer.
10. On line 10, the start date of “business” should be July 1, XXXX of the year you take control. Wheaton fiscal year ends June 30.
11. Other lines are self-explanatory (check instructions). Note that on line 14 “Principal Business,” you should enter REGIONAL ACTIVITIES.
12. Once completed, call the IRS number listed for your area on the instructions, and follow touchtone instructions **IF YOU HAVE ACCESS TO A FAX** to send confirmation within 24 hours. Be sure to ask for the fax number.
13. If you **DO NOT HAVE ACCESS TO A FAX**, mail the form to the appropriate address listed in the instructions for your geographic area. You should receive an EIN within three weeks.
14. Once you have been assigned an EIN, it belongs to the regional club for as long as it is in existence. Be sure to put it in a safe place and pass it along to future club officers. The only things that will change are the mailing address and “care of” person. These changes must be made in writing and instructions follow on the next page.

## **GUIDELINES FOR CHANGING REPORTING NAME OF REGIONAL CLUB FOR TAX ID NUMBER**

These instructions should only be used if your Regional Club has already been assigned an EIN. The EIN is permanent for as long as the Regional Club exists. What changes are the mailing address and the “care of” person. The change process is simple:

1. Write a letter to the IRS referencing the EIN number.
2. Inform them that the “care of person” list on Line 3 should be changed.
3. Inform them that the mailing address is now XXXX (be sure to include county and state).
4. Include your daytime phone number.
5. Sign and date the letter, and provide your PRINTED name and title of yourself as well.
6. Mail to:

Internal Revenue Service  
ATTN: Entity Department  
Drop 334  
Philadelphia, PA 19255

NOTE: This will vary from region to region. Check with your local IRS department/division. Generally, where you mail your return is where you will send and get information.

Be sure to keep a copy of all correspondence and pass copies on to the next Class Treasurer/Officer in case there are any problems.

# **APPENDIX A**

## **SAMPLE INVITATIONS**

# **APPENDIX B**

## **CLUB REPORTING FORMS**

# **WHEATON CLUB ANNUAL REPORT**

FY'05 (July 1, 2004-June 30, 2005)

## **INSTRUCTIONS**

### **1. Survey**

Regional Coordinators are asked to take a few minutes to fill in this survey to help evaluate the needs and issues of volunteer clubs and the processes, materials and services which the Association provides.

### **2. Financial Statement**

Please ask your Treasurer to complete the attached financial statement and return with other documentation.

### **3. Steering Committee Members/Volunteers**

Please attach a printed list of all FY'04 Steering Committee members and volunteers, and include their current titles, addresses, phone and fax numbers, e-mail addresses and terms of office.

### **4. Events**

Please complete the attached events form.

Club Name: \_\_\_\_\_

Wheaton Club Annual Report Form  
FY'05 (July 1, 2004-June 30, 2005)

**PART I: VOLUNTEERS**

1. In what year was the current coordinator appointed? \_\_\_\_\_

2. What methods did you use to recruit volunteers? (check all that apply)

<input type="checkbox"/> Mail	<input type="checkbox"/> Word of mouth
<input type="checkbox"/> E-mail	<input type="checkbox"/> Club Web site
<input type="checkbox"/> Newsletter	Other _____

3. What methods were most effective in recruiting volunteers?

<input type="checkbox"/> Mail	<input type="checkbox"/> Word of mouth
<input type="checkbox"/> E-mail	<input type="checkbox"/> Club Web site
<input type="checkbox"/> Newsletter	Other _____

4. How often are committee meetings held?

<input type="checkbox"/> Once per year	<input type="checkbox"/> Three times per year
<input type="checkbox"/> Twice per year	Other _____

5. Current number of committee members \_\_\_\_\_

6. What is the current term of office for committee members?

<input type="checkbox"/> One year	<input type="checkbox"/> Three or more years
<input type="checkbox"/> Two years	<input type="checkbox"/> Unspecified

7. How many consecutive terms are allowed?

<input type="checkbox"/> One term	<input type="checkbox"/> Three or more terms
<input type="checkbox"/> Two terms	<input type="checkbox"/> Unspecified

8. Does your committee structure allow for natural leadership succession (i.e., an assistant coordinator becomes coordinator)?

Yes       No      Other/comment \_\_\_\_\_

9. Does your club have a year-round nominating committee and/or a person dedicated to volunteer recruitment?

Yes       No      Other/comment \_\_\_\_\_

### **PART II: EVENTS AND ACTIVITIES**

1. What would you describe as the primary purpose of your Club?

Networking                       Social  
 Educational                      Other \_\_\_\_\_

2. What was your Club's most successful program and/or event this past year, and why?

3. What was your Club's least successful program and/or event this past year, and why?

### **PART III: PROMOTION**

1. Do you produce a newsletter?

Yes       No

2. How many times a year?

Monthly                       Biannually                      Other \_\_\_\_\_  
 Quarterly                       Yearly

3. How do you circulate your newsletter?

Electronically                       Postal Mail  
 Both                                      Other \_\_\_\_\_

4. Does your Club have a Web site?

Yes                       No

If yes, how often is the Web site maintained?

Weekly                       Yearly  
 Monthly                       No regular maintenance

5. Do you use e-mail or the Web to promote your events and activities?

E-mail  
 Web  
 Both

**PART IV: SERVICE FROM THE ALUMNAE/I ASSOCIATION**

1. Have you met your current staff contact in person?

Yes  
 No

2. Please describe your relationship with your primary staff contact? (Please circle.)

Very Satisfactory                                      Unsatisfactory  
5                      4                      3                      2                      1                      N/A

Comments:

3. Please assess any production (printing and mailing) and data (lists, labels, data downloads) assistance you have received this year. (Please circle.)

	Very Satisfactory			Unsatisfactory		
Lists	5	4	3	2	1	N/A
Labels	5	4	3	2	1	N/A
Data downloads	5	4	3	2	1	N/A
Printing	5	4	3	2	1	N/A
Mailing	5	4	3	2	1	N/A

Comments:

4. Rate the following services and products in terms of their importance to your club: (Please circle.)

	Very Important			Not Important		
Regional Handbook	5	4	3	2	1	N/A
ALC Regional Workshop	5	4	3	2	1	N/A
Staff contact correspondence	5	4	3	2	1	N/A
List and Label Download	5	4	3	2	1	N/A

5. Please rate the following services you have used in terms of quality to your club: (Please circle.)

	Very Important			Not Important		
Regional Handbook	5	4	3	2	1	N/A
ALC Regional Workshop	5	4	3	2	1	N/A
Staff contact correspondence	5	4	3	2	1	N/A

6. Overall, how would you describe the services you received from the Alumnae/i Association? (Please circle.)

Very Satisfactory			Unsatisfactory		
5	4	3	2	1	N/A

Additional comments:

Club Name \_\_\_\_\_  
FY'05 (July 1, 2004-June 30, 2005)

**FINANCIAL STATEMENT**

Cash balance as of July 1, 2004	\$ _____
Cash receipts for July 1, 2004 to June 30, 2005	\$ _____
Dues collection	\$ _____
Income from events	\$ _____
Interest income	\$ _____
Other receipts (please describe)	\$ _____
<b>Total Receipts:</b>	\$ _____
Cash disbursements for July 1, 2004 to June 30, 2005	\$ _____
Cost of events	\$ _____
Postage, printing and supplies	\$ _____
Cost of committee meetings	\$ _____
Contribution to Alumnae/i Scholarship Fund	\$ _____
Other expenses (please describe)	\$ _____
<b>Total Disbursements:</b>	\$ _____
<b>Cash Balance of July 1, 2005</b>	\$ _____

What is the name of the local bank in which you keep your Wheaton Club

Account(s)? \_\_\_\_\_

Club Name \_\_\_\_\_  
FY'05 (July 1, 2004-June 30, 2005)

**REGIONAL STEERING COMMITTEE**

Please attach a complete list of all officers and their home and work addresses, telephone and fax numbers, and e-mail addresses.

<u>Position</u>	<u>Name</u>	<u>Date Elected</u>	<u>Term of Office</u>
Coordinator	_____	_____	_____
Co-Coordinator/ President-elect	_____	_____	_____
Secretary/Treasurer	_____	_____	_____
Program/Events Chair	_____	_____	_____
Webmaster	_____	_____	_____
E-mail List Editor	_____	_____	_____
Newsletter Editor	_____	_____	_____
Filene Center Liaison	_____	_____	_____
Young Alumnae/i Chair	_____	_____	_____
APAC Regional Chair	_____	_____	_____
Committee Members- At-Large	_____	_____	_____
	_____	_____	_____



## CLUB EVENT EVALUATION FORM

Name of Club: \_\_\_\_\_

Event Coordinator: \_\_\_\_\_

Name/Type of Event: \_\_\_\_\_

Date: \_\_\_\_\_ # of Attendees: \_\_\_\_\_

Location: \_\_\_\_\_

Speaker (if applicable): \_\_\_\_\_

Topic: \_\_\_\_\_

Please circle (1 = lowest, 4 = highest, where applicable):

Overall Event Rating	1	2	3	4
Interesting Topic	1	2	3	4
Quality of Venue	1	2	3	4
Presentation Skills of Speaker	1	2	3	4
Length of Event	too short	about right	too long	
Question & Answer Period	too short	about right	too long	
Would you attend another talk given by this person?			Yes	No
Would you attend another Wheaton event similar to this one?			Yes	No
Why?				

Other comments/suggestions (use reverse side as necessary)

Please return this form to: Heather Corbett'86, Associate Director of Alumnae/i Relations & Annual Giving

## SAMPLE SURVEY

### Wheaton (Club Name) Alumnae/i Survey (month, year)

The Wheaton Club of \_\_\_\_\_ wants your help! We need your suggestions to help us plan events of interest to you and your family. Please return this questionnaire to the fax number or address listed below; we would appreciate your response by (month, day, year).

Name \_\_\_\_\_ Class year \_\_\_\_\_

Street \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip code \_\_\_\_\_

Area code \_\_\_\_\_ home number \_\_\_\_\_

Area code \_\_\_\_\_ business number \_\_\_\_\_

E-mail address \_\_\_\_\_

What type of events would you be interested in attending? (please circle)

	very interested	fairly interested	no preference
Wheaton speakers	1	2	3
Local speakers	1	2	3
Cultural (art, music, theater)	1	2	3
Sports	1	2	3
Family-oriented	1	2	3
Trips/travel	1	2	3
Workshops/seminars	1	2	3
Tours (local industries, gardens, etc.)	1	2	3
Young alumnae/i events	1	2	3

What do you hope to gain from these events? (please circle)

	very interested	fairly interested	no preference
Business contacts	1	2	3
Social contacts	1	2	3
Continuing education	1	2	3
Involvement with Wheaton College	1	2	3
Career related/networking	1	2	3
Other:	1	2	3

What type of events do you prefer? (Please check all that apply.)

Breakfast       Dinner       Cocktails  
 Lunch       Cocktails w/optional dinner       Picnic  
 Meeting only/no food

Please list any ideas, topics, or requests for events in which you would be interested:

During which time(s) of the year are you most likely to be active in the Club? (Please circle one.)

Fall      Winter      Spring      Summer

Do you prefer weekday or weekend events? (Please circle one)

Weekday      Weekend      No preference

Which days of the week are most convenient for you? (Please circle all that apply)

Mon    Tues    Wed    Thurs    Fri    Sat    Sun    No Preference

What time of day is most convenient for you? (Please circle.)

Morning      Lunchtime      Late Afternoon/Early Evening      Dinnertime

How many guests would you typically bring with you? \_\_\_\_\_

What price range would you consider appropriate for an event that includes a light dinner?

\$25-\$30      \$30-\$35      \$35-\$40      \$40-\$45

What price range would you consider appropriate for an event that includes lunch?

\$20-\$25      \$25-\$30      \$30-\$35

I am interested in joining others on a Club committee to help make these events possible:

Yes, please contact me at: \_\_\_\_\_

I, or a professional associate, would like to make a presentation to the (Club name):

Please contact me at: \_\_\_\_\_

Please list other suggestions or comments for Wheaton events/activities in (Club name). Thank you very much for your response!

If you have any questions, thoughts, or ideas, call or e-mail:

(Name, year)

(Telephone number)

(E-mail address)

Please return this survey to (name) by fax (fax number) or to (address). Thank you.

**APPENDIX C**

**RESOURCE LIST**

## **ONLINE RESOURCE LIST**

You may want to try some of these online resources to help you plan regional events, manage club activities, and communicate with your club committee and constituents. (Wheaton does not provide technical support or assistance in using any of these sites or services.)

### **TICKETLEAP.COM**

Take advantage of online ticketing solutions at competitive prices. Conveniently purchase tickets or registrations for specific events, or use the site to find information about events in your area. For a nominal service fee, Ticketleap offers tickets to a variety of events for all ages in categories that span arts and theater, academia, business, music, and sports.

### **ZOOMERANG.COM**

Create professional, customized surveys and receive reports on results. You don't need technical expertise to create a survey, and the Zoomerang Basic product is free.

### **CITYSEARCH.COM**

Search for restaurants, florists, movie theaters, service providers, and much more in any area of the country.