
General Organizational Tips

With the ever-increasing size of graduating classes and the mobility of our constituency, alumnae in many areas of the country are anxious to develop new clubs; and some existing clubs are interested in updating or revising their programs and procedures. Here are some tips and organizational guidelines to help you get started.

THE ELECTRONIC ADDRESS LIST

An alphabetical address list of alumnae and current students in the club area is routinely sent to club presidents on an annual basis. Additional reports and mailing labels are available to club presidents at any time, using the online request form. Alumnae lists may be sorted 1) alphabetically, 2) by class year, or 3) in zip code order.

Your first priority in getting organized is establishing club boundaries.

Establish a range of zip-codes that will define a geographic area for your club. The Alumnae Office will print an address list of all alumnae living within this zip code range. These are your club members and the zip code range constitutes your club boundaries. Zip codes may be changed or deleted upon request. In fact, it is a good idea to periodically reevaluate your club boundaries to allow for urban growth or realignment of zip codes in and around your city.

Whenever the club is doing a directory, verify all information on your list and record new information if there are any changes. (Changes should be recorded and sent to the Alumnae Office even if the alumna has moved away from your club area.) Ask for the spouse's name if the alumna is married, her occupation and employer if

she works, and an office/daytime telephone number.

AS SOON AS AN ADDRESS CHANGE IS REPORTED TO YOU, NOTIFY THE ALUMNAE OFFICE SO THE STAFF MAY ENTER THE CHANGE INTO THE DATABASE.

If you would like the Alumnae Office to track your dues-paying members, please send us a complete list of alumnae who paid dues for the current year. Once a file is created in the College database, you will be able to request lists and/or labels that only have the current dues-paying members on it.

Please remember that the electronic list is provided for you to conduct official club business. It should not be released to any other individual or organization for any other purpose. If you are planning a co-sponsored event with any other alumnae/i organization, Saint Mary's College must have equal responsibility and publicity in the event-planning process. **Lists and labels may not be released for any purpose other than a clearly sponsored or co-sponsored Saint Mary's alumnae club activity**

ALUMNAE CLUB SURVEY

To get more alumnae involved, it is a good idea to find out which alumnae are interested in volunteering for the club, what type of events your members are interested in attending, how they evaluate past club activities, what day and time is the best to schedule meetings, etc. A questionnaire once every year or two, depending on the length of the president's term of office, will provide an abundance of information which will help you in planning your club's schedule of activities. Information gathered through your questionnaire will also be valuable when putting a club directory together. The Alumnae Relations Office can assist you in the writing, duplicating and mailing of your questionnaire.

Student send-offs, Founders' Day luncheons and dinners, continuing education programs, service projects, book clubs and picnics have been on the agendas of many of our clubs. Yet with all of these programs being offered, we still hear that more and more of our working, "mothering" and volunteering Saint Mary's alumnae just cannot find the time--and even on occasion, the energy -- to get out to a Saint Mary's alumnae club gathering. The greatest problem common to all club presidents is attracting and encouraging alumnae whose lives are filled with family, work and civic obligations, to become actively involved in their alumnae club. This is how a survey/questionnaire can assist a club in planning events that best suits its members. **SEE THE APPENDIX FOR A SAMPLE QUESTIONNAIRE.**

PRODUCING A CLUB DIRECTORY

The Alumnae Relations Office can assist you in printing the directory at a very reasonable cost to your club, or you can ask an alumna who has access to duplicating equipment to produce it for you (often the alumna or her employer will donate this expense). If the Alumnae Relations Office produces the directory for your club, please send the document already formatted and allow at least four to six weeks for delivery.

If possible, all alumnae, whether dues-paying or not, should be listed in the local directory. However, it is usually offered FREE to dues-

paying members only. If your club's treasury cannot absorb the cost of publishing a directory, consider charging a minimal fee for the book.

Remember, when verifying each alumna's information from your club list, please record any changes and send them to the Alumnae Office for updating. Ask for the spouse's name if the alumna is married, her occupation and employer if she works, and an office/daytime telephone number.

The directory can be a great benefit to your club in forming car pools, getting classmates together, and identifying alumnae who can be of service to the club and to the College. And remember that the Alumnae Relations Office staff will be happy to help you put together your directory if you need ideas or assistance with the project.

ALUMNAE CLUB MANAGEMENT BYLAWS

Writing a code of bylaws helps a club to define its purpose, membership, officers and duties of officers, procedures and standing rules. A code of bylaws is a great organizational tool for new clubs or clubs that are reorganizing. It also provides guidelines for future club leaders and assures continuity in the operation of the club. If you are updating or rewriting your bylaws, all must be in accordance with the code of bylaws of the Alumnae Association. Be sure to send a copy of your bylaws to the Alumnae Relations Office. **For sample bylaws, contact the Alumnae Relations Office.**

OFFICERS

The number of officers for an alumnae club should be determined by the size of its membership, the number of events that the club holds annually, and the geographical size. **Every club should have a president (or designated point person to Alumnae Relations) and treasurer.** Usual additions include a vice president, treasurer and president-elect.

A communications chair may also be included to enhance the club's communication efforts via mail, e-mail or the web. Some clubs have added an alumnae VISA coordinator to assist with Admission Office efforts. A club's board of directors usually includes all of the above-mentioned volunteers as well as event chairwomen.

When nominating a slate of officers, it is advisable to have different age groups of alumnae represented. Alumnae who have indicated on the club's questionnaire that they are interested in holding office and frequently participating in club events, are identifiable as potential officers. Election of officers is appropriate; however, the prevalent policy is to present a single slate of officers for ratification by the club membership.

Suggested duties of alumnae club officers and board of directors are:

PRESIDENT: (Job description as approved by the Alumnae Association Board of Directors)

1. Represent Saint Mary's College and the Alumnae Association as the primary liaison with alumnae in the designated club area;
2. Promote the general welfare of the College by fostering friendship, cohesion and support of the College among local alumnae, through the organization of club events and projects;
3. Assist in the implementation of programs and projects of the Alumnae Association or the College;
4. Maintain primary club contact with the Alumnae Relations Office;
5. Maintain contact with the Alumnae Association Board of Directors via the designated board liaison, and bring alumnae-related issues, suggestions, questions or concerns to the attention of the Alumnae Board;
6. Preside at all club meetings;
7. Be responsible for the establishment of all club committees and the appointment of chairs and/or board members;
8. Provide for continuity in leadership and a smooth transition;
9. Transfer all club materials to the president-elect (i.e. Club Handbook, records, photos, etc.) and instruct her on the duties of the president.
10. Provide submissions to the Club News section of Courier. (Can be delegated to any other position, if necessary)

VICE PRESIDENT:

1. Presides at meetings in the absence of the president;
2. Familiarizes herself with the duties of the president;
3. Heads at least one major committee;
4. Maintains the membership list and advises Alumnae Office of changes within the club area.

SECRETARY:

1. Keeps minutes of all meetings;
2. Submits activity reports on all events to the assistant director of Alumnae Relations for Alumnae Office files;
3. Assists the president with club mailings.

TREASURER:

1. Maintains and supervises club bank account;
2. Pays all club bills;
3. Collects and records club membership dues;
4. Prepares year-end financial statement.

BOARD OF DIRECTORS:

(**Optional**, depending on size of club and number of activities. May or may not include positions listed below.)

Some alumnae clubs choose to manage business through a board of directors structure with no appointed president. This is usually composed of committee heads and various members. One board member must be designated as the official contact with the Alumnae Relations Office. The number of directors varies according to club size and number of activities. Board members should represent alumnae from different classes (younger and older) and a variety of life-styles. Their terms should be staggered which will allow continuity. Terms of all board members should not expire at the same time.

Possible positions for a board of directors:

- Communications chair
- Newsletter or webpage chair
- Service chair
- Major events chair
- VISA coordinator
- Fundraising chair
- Young alumnae chair

RECORD KEEPING

Be sure to keep detailed records of all club events and activities. Include newsletters, invitations, publicity, financial reports, evaluations of events, etc. Have each new event chair record what was done, when, by whom and how successful it was. This creates a club legacy and provides a framework for your event chairs. Also, keep a list of those attending various events, as it will help you to pinpoint volunteers for event chairs, hostesses, committee chairs and officers. Get into the habit of providing each new chair with an "event folder" which contains:

1. Samples and records from previous events;
2. Outline of the chair's expectations and responsibilities;
3. 12-week Planning Guide;
4. Event checklist;
5. Evaluation form;
6. Activity Report Form for sending to the Alumnae Office immediately after the event.

(ALL OF THE ABOVE CHECKLISTS ARE FOUND IN SECTIONS 3 IN THE HANDBOOK.)

BASIC "HOUSEKEEPING" FORMS

Club/Contact Area Annual Report Form:

Each year every club president and area contact needs to fill out this form. It contains questions regarding the group's status in several areas: organization, finance, programming, etc. This serves as an official record for the Alumnae Office, detailing the activities of the club or contact area for a specific year. These reports are typically sent to club presidents and area contacts in August and can be downloaded at <http://www3.saintmarys.edu/alumnae-club-resources>.

Club Activity Reports:

Club activity reports are used for Alumnae Office records and to help the Board liaison evaluate activities and the direction of the club. Forms can be downloaded from the Alumnae website at: <http://www3.saintmarys.edu/alumnae-club-resources>. Please contact the Alumnae Office if you need hard copies.

When writing your "report," please keep in mind the guidelines summarized on the front of the report form as well as the tips offered here:

- ☐ Write in newspaper reporting style;
- ☐ Focus on details of a particular party. Describe the entertainment program/special guests; (Table decorations, menu, etc. are not news, unless they are very unusual.)
- ☐ Use active verbs and strong adjectives.
- ☐ Avoid cliches and tired phrases such as "a good time was had by all."

Your report should be sent to the Alumnae Relations Office immediately after the event has taken place. This will assure an accurate record of your event for office files.

TREASURY, DUES AND CLUB EXPENSES

DUES...DUES...DUES

Dues are due!

What do dues do?

Dues do pay for printing.

Dues do pay for postage.

Dues do pay for serving you,
the Saint Mary's alumnae.

Do we need dues?

You bet we do!

We sure do thank you,

We really, really do!!!

Source: Washington D.C. Alumnae Club

Each club is expected to cover all expenses related to its operation. With the ever-increasing size of our alumnae clubs and the high cost of printing, postage, and entertainment/hospitality, there is no doubt that it is becoming more and more expensive to operate a well-organized, active, and effective alumnae club. Club officers are definitely not expected or in any way encouraged to absorb club costs. Each club, no matter how small, must have a dues structure which provides the working capital for printing, postage and local event expenses.

When planning your club's activity calendar:

- Determine which events will pay for themselves (via an admission charge) and which event expenses will be absorbed by the club's treasury.
- Decide how many mailings you will do (newsletter, events, club directory) and what type of mailing.
- If the mailings will be done First Class or Bulk. (Bulk rate for mailings over 200 pieces only.)
- If your mailings will be sent to dues-paying members only or to the entire club.

Use all of this information to create a general operating budget and a budget for each event. Decide on the amount to charge for your club's dues. Most clubs find that \$20-\$25 annually is a reasonable amount. Some clubs offer a differential dues structure which offers a discount to recent grads (one to five years out) and "older than golden" alumnae (more than 50 years out). It is wise to maintain a surplus of funds from year to year to offset future or unexpected expenses, or to balance the budget if an event should happen to "run into the red." **Sometimes clubs will find a depleted budget and are in need of assistance. The Alumnae Office does have start-up funds to help in these situations.**

Money-saving Tips

Remember, your invitations, newsletters and club directories can be printed and mailed from the College at a reduced cost to the club. You are charged only what it costs the Alumnae Office to have it printed "in-house." Postage costs are, of course, determined by whether you mail First Class or Bulk rate, which requires a minimum of 200 pieces. You will be expected to reimburse the Alumnae Office upon receipt of a bill for the cost of the printing and/or postage. There is no charge for basic graphic design assistance. Be sure to allow 6-8 weeks in your planning calendar if you have your materials printed at the College.

Include a dues slip on the bottom of your newsletters and ask for dues at every event. Provide incentives for paying dues, e.g., a FREE alumnae club directory or reduced admission to events for

dues-paying members.

TREASURY

Opening a checking or savings account: Most banks now require an **Employer Identification Number (EIN)** to open a checking or savings account for a company, organization or club. To obtain this number for your club, you will need to complete federal form SS-4. This is merely a federal identification number (much like your social security number) and does not give a club federal tax exempt status. Instructions on how to obtain the EIN can be found at the following address:

<http://www.irs.gov/businesses/small/article/0,,id=97860,00.html>

Upon request, the Alumnae Office will provide an affidavit attesting to the non-profit status of our alumnae clubs. This is sometimes necessary to qualify for a waiver of bank service fees.

Tax exempt status: The Alumnae Association of Saint Mary's College exists as a department within the College Relations division of the College. As such, it derives its tax exempt status as a part of the College, an educational institution exempt under Section 501(c)(3) of the Internal Revenue Code. Saint Mary's alumnae clubs, in and of themselves, are not tax exempt, and contributions made to alumnae clubs are not deductible for federal income tax purposes. Although our alumnae clubs maintain an affiliation with Saint Mary's College and the Alumnae Association, promoting and supporting the mission and purpose of the College, the IRS has expressed the view that alumnae clubs do not meet the criteria for a 501(c)(3) exemption because they have been formed through the efforts of individuals in the communities involved, and maintain their own separate identity.

Further, Saint Mary's College derives its 501(c)(3) status from a group exemption ruling under the U.S. Catholic Conference, thus prohibiting the College from covering alumnae clubs in a similar manner. Rules for tax exemption at the state level vary from state to state, and it is up to each alumnae club to determine their state sales tax exemption status.

When a club is planning a major fund-raising event to benefit Saint Mary's (generating net proceeds in excess of \$10,000), such as for the benefit of a scholarship fund to be administered by Saint Mary's, a restricted fund-raising account may be established at the College. All club proceeds (i.e. cash from reservation income, monetary donations, raffle or auction income) are held in the restricted account at the College, and expenses are paid by the College out of that account. Since all proceeds and income are run through the College, there is no question in regard to taxability and the portion of the contribution that represents a charitable tax deduction. For club events that are run through a restricted account, the club gains the added benefit of having the College provide the written receipt for donations that qualify as a charitable contribution.

NOTE: Recent changes in the tax code have imposed new requirements for charitable and “quid pro quo” contributions and gift substantiation.

For example:

- The IRS does not consider the purchase of chances to win prizes in raffles, lotteries, or similar drawings or contests to be deductible contributions.
- Only the excess of the admission ticket price over the fair market value of the goods or services provided (i.e. food and entertainment) to the donor is tax deductible.
- The amount of an auction purchase deductible for federal income tax purposes is limited to the excess of the amount contributed over the estimated value of the goods and/or services received by the donor.

A comprehensive explanation of IRS regulations related to special events and auctions is available from the Alumnae Relations Office. Any club desiring to set up a special fund-raising account must agree to adhere to reporting guidelines established by the business and development offices, and the IRS. Please contact the Alumnae Relations Office for more information about establishing a restricted account at the College.

EMPLOYER IDENTIFICATION NUMBER (EIN)

When you open a checking or savings account for your club, you will be asked to give your organization's Employer Identification Number (EIN). Even long-established clubs may eventually be asked by their financial institution to provide this number.

The EIN is analogous to your social security number. It is used solely for identification of your organization. It in no way entitles your club to non-profit or tax exempt status, nor does it imply any liability for tax reporting.

To apply for the EIN, you must complete federal form SS-4. Your local bank should the form on hand. Or, contact the Alumnae Relations Office.

Tips for completing the form:

1. After completing the SS-4 form, call the Service Center at 606-292-5467 or fax them at (606) 292-5760. You may give your information over the phone and receive an EIN for immediate use.
2. The mailing address (item 4a, 4b) may be that of your president or the person who handles the money. When this person or address changes, be sure to contact the IRS as well as the Alumnae Relations Office with the updated information.
3. If your fiscal year is the calendar year, list December in item 11. If your fiscal year is the academic (or club) year, list May in item 11. (The fiscal year for Saint Mary's College is June 1-May 31.) If your fiscal year is other than above, list the month in which it ends.
4. For item 10, enter the date your club was organized. If you are unsure, please contact the Alumnae Office for the information.
5. Please return the tear-sheet below for our office files.

Upon receipt of your EIN, please return this portion to the
Office of Alumnae Relations
110 Le Mans Hall
Saint Mary's College
Notre Dame, IN 46556-5001

Club: _____

Employer Identification Number: _____

Signed: _____ Date: _____

LEADERSHIP AND MEMBERSHIP

TIPS ON RECRUITING ALUMNAE CLUB VOLUNTEERS

The success of your alumnae club depends upon the strength and commitment of your volunteer pool. All clubs need a nucleus of enthusiastic volunteer leadership to position the alumnae club as a vital, lively organization. Already existing clubs must add new life and energy to their organizations by constantly identifying and cultivating new volunteers. Even your most committed volunteers may one day show signs of burnout, or changes in the personal or professional lives of your volunteers may require them to lessen their involvement with the club. Almost anyone who has been successful as a volunteer herself can be effective in selling her own commitment to the club to other alumnae.

Have you noticed that the best volunteers are often the busiest? They fill their hours with jobs, family duties, and even other volunteer work. Everybody wants some of their time -- and if they know just what you expect, they'll work you into their schedules too. How can you win these "wonder workers"? Here are some tips for recruiting and retaining your most valuable and loyal workers:

A general plea for volunteers in your club newsletter can pave the way for a phone call to your selected prospect. If you're seeking someone to volunteer for a position of major responsibility and time commitment, consider meeting in person. One-on-one contact is more effective.

- Ask open-ended questions so the volunteer has to say more than "yes" or "no". For example, if you want a volunteer to plan a major club event, ask what she has liked and disliked about past events.
- Supply a written job description. Be sure the details of the position and the demands it will place upon the volunteer are clear. Include a time/term commitment.
- Follow-up your contact, either successful or unsuccessful, with a thank you note. It should also mention any agreements you and the volunteer have made.
- Emphasize the "fun" as well as the work. The fun of volunteering is getting acquainted with others.

DON'T...

...tell a volunteer, "You're my last hope." If you've said this to a volunteer, you can bet she thought, "Am I your last choice, too?"

...put a volunteer on a committee that doesn't do anything. If you've gone to the trouble to solicit help, be sure your volunteer has something meaningful to do.

Retention

Now that you've found your volunteers, how do you keep them?

- Make sure they have a written explanation of the job and what is required.
- Supply written documentation and sample materials related to the job they're being asked to do. Keep a file for each event or activity and have each year's chair submit a checklist and follow-up evaluation.
- Don't hesitate to repeat your directions. If you make an assignment by phone, follow-up with a note confirming details.
- Start new volunteers with low-risk situations.
- Provide a "chair-elect" to assist with the job and step in for the next term or event. This alleviates loss of valuable momentum while new leaders absorb basic procedural information.
- Respect your volunteers' time. Make sure every meeting is productive.
- Check-in with your volunteers regularly. Make sure they are feeling good about what they are doing. If they have a problem, help them solve it, thus strengthening your relationship.
- Send a thank-you note, clever card or small appreciation gift for a job well done.

Of course, even with carefully selected and highly goal-oriented volunteers, problems will come up. However, if you hold your volunteers accountable, clearly spell out responsibilities from the start. When things go wrong, you can base your criticism on the difference between what was expected and what happened.

Above all, respect your volunteers. Make them feel good about participating in the club. Listen to what they have to say, use their time and talents wisely, and reward them for their participation and successes.

MAINTAINING A VITAL CLUB MEMBERSHIP

One of the biggest problems for clubs is active club members. Every president would like to have well-attended events and activities as well as an unending list of willing and able volunteers to assist with club projects; but the club membership does not always respond according to the wishes of the presidents! So, what can a president do to attract new members? And how can she motivate older members to become more actively involved in club activities? These are not easy questions to answer, but some of the following tips may help you to generate excitement and enthusiasm for club activities among the Saint Mary's alumnae in your area.

1. Begin by examining your club's overall program.

- Be familiar with the alumnae in your area. Are the majority of your members older, younger or "in between"? Are they women in the workplace, active volunteers, homemakers or "all of the above"? What are their interests --- women's issues, money management, career planning? What other parish, civic and social activities occupy their time? Taking these answers into consideration, plan a program that provides a variety of alternatives to their personal activities.
- Consider the convenience of your events/activities. Have you planned your program at the optimum time and place? Would your younger members appreciate a baby-sitting service? Would the older members come if car pools were formed?
- Choose a special setting. Watch your local newspapers for announcements for special events or performances. Poll your membership to find out if anyone has access to an impressive home or other unique sites.

- Connect your meeting with the campus. Whenever possible, sponsor a visit by College personnel (faculty member/administrator/student). Or invite a local alumna to speak at a special program in conjunction with a local event.
- Do you have an active presence in your members lives? Do you have an up-to-date website for tech-savvy alumnae? Do you provide information about events in a timely manner for alumnae to make adequate plans? Do you use more than one way to communicate with your members?
- Be enthusiastic about your program. Recruit energetic, "live-wire" chairwomen for your events. Involve as many alumnae on their committees as possible. Have a hostess welcome any new members. This will make them feel especially welcome.

2. Once the program is set, finding and keeping active members/participants is the next step.

- Encourage networking.
- Use e-mail or the telephone. Stay in contact with club members between meetings. Call to recruit new members or update older members on what the club is doing. A "sorry you missed the meeting.... We had a wonderful time.... phone call may encourage alumnae to attend your next event. Split the calling with other officers or telephone committee members.
- Allow plenty of lead time for events. Publish your calendar of events early and often.
- Offer merchandise incentives. Have a drawing or raffle. Solicit members of the club to donate the items and publish in advance what the item will be.

3. Finally, involve as many young alumnae in your club as possible.

- Get them early. Contact new alumnae and alumnae new to the area before they get too involved with other civic or professional groups. Let them know that the club can be means for them to get to know the community. The alumnae office can provide lists of alumnae at any time.

- Get them REALLY early. Involve current students in the club during their vacation times in hopes that they will be active members after graduation. Send them occasional greetings during the year (exam time, Christmas, commencement, etc.). Invite their parents to special social activities sponsored by the club. Give as much support and encouragement to your area students during their college years as possible. Even if they do not eventually settle in your city, you have helped another club president to cultivate new members!
 - Use e-mail or a Web page. Utilize this inexpensive tool to communicate with alumnae. Notify them of upcoming events, news of the College, and encourage participation.
 - Consider social networking. As more and more alumnae join the world of social networking, creating events, groups and pages on Facebook can provide an easy way to remain present in an alumna's day to day life.
 - Get recent graduates hooked. Hold informal social gatherings geared specifically to young members. "T.G.I.F.s" and happy hours have been very successful for many of our Saint Mary's clubs.
 - Get them in the pocketbook. Establish special dues and event rates for your graduates. Hold special events for young alumnae in establishments which offer a reasonable price structure.
 - Give young graduates representation on your board or officer structure. Establish a young alumnae committee to help you recruit new members and to plan programs which appeal to young graduates. Target them to serve as members of Alumnae VISA in your area.
- to take on definite responsibilities.
 - Contact our most recent graduates — a letter of welcome or a personal phone call. Often they are new to the area and are most eager to become actively involved in a Saint Mary's alumnae club.
 - Use ideas generated from your questionnaires and streamline activities from previous years, using your evaluations as a guide.
 - Repeat favorite get-togethers such as a Founders' Day Mass and luncheon/dinner.
 - Don't be afraid to try something new. Read the "Club News" section of your Courier to see what other alumnae clubs are doing.
 - Include alumnae parents, parents of current students, and the students in events.
 - Provide a variety of activities scheduled on different days and times in different locations throughout your geographic area.
 - Identify your efforts with Saint Mary's College.

Remember that it is impossible to attract everyone to every event. Success should not be measured strictly by numbers!

THE CLUB ACTIVITY CALENDAR

When planning your club's calendar for the year, keep in mind the various age groups, life-styles and interests of your constituency.

- Provide a variety of club programming.
- Involve as many people in your club's planning as possible and invite new members