THE WILLIAM & MARY
ALUMNI ASSOCIATION

HANDBOOK FOR CHAPTER LEADERS

ALUMNI PROGRAMS & SPECIAL EVENTS
ONE ALUMNI DRIVE
P.O. BOX 2100
WILLIAMSBURG, VA 23187-2100
757.221.1174
FAX 757.221.1186
ALUMNI.PROGRAMS@WM.EDU
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Dear William and Mary Alumni Association Volunteer:

Thank you very much for agreeing to serve as a leader for your local chapter or club! This handbook was designed to assist you as an alumni chapter leader as you embark on your term of office. It is a collection of policies, procedures and guidelines that are important for you to know. Our hope is that it will address many of the issues that may arise through the course of operating the local chapter. Of course, there may still be questions and in those instances we invite you to contact the Association for further guidance. We are always available to assist you!

I hope that you find your volunteer experience to be a positive and rewarding one. We understand that it takes a lot of time and energy to lead a chapter through the daily operations and to offer a diverse range of programs. We appreciate your dedication and continued commitment to your local chapter, the Association and to the College. I know you will make a difference in the chapter and in the lives of the alumni members.

Sincerely,

Karen Ryan Cottrell ‘66, M.Ed. ‘69, Ed.D ‘84
THE WILLIAM AND MARY ALUMNI ASSOCIATION (WMAA)
The William and Mary Alumni Association was founded on July 4, 1842, and is the sixth-oldest alumni organization in the country. All graduates and former students of the College of William and Mary are considered members of the Alumni Association. Membership in the Alumni Association is automatic, for life and does not require a fee.

The Alumni Association is an independent, nonprofit organization that serves the College of William and Mary and its many alumni, students, parents and friends. Self-governed by a 21-member Board of Directors, the Alumni Association employs staff members in various departments including the Executive Office, Business and Budget Management, Alumni Communications, Alumni Products and Services, Alumni Programs and Special Events, Alumni Records and Information Systems, and Alumni Travel.

The Alumni Association is headquartered in the Alumni House, which is located on Richmond Road, next to Zable Stadium. Normal business hours are 8 a.m.-5 p.m., Monday-Friday.

ALUMNI PROGRAMS AND SPECIAL EVENTS
The Alumni Programs and Special Events staff assists the volunteer leadership in their efforts to connect with alumni by serving in an advisory role providing support, offering guidance and exploring new ideas. Each alumni chapter/club is assigned a staff liaison with whom the chapter leadership may consult on various topics such as chapter operations, event planning, communications and chapter finances. In addition, the staff is responsible for planning and implementing major signature events including Homecoming, Reunion activities and the New York Auction to name a few. They also assist leadership of constituent groups and councils. Please see the Alumni Association Web site for the most up-to-date list of chapter and Association events.

SUPPORT FROM THE ASSOCIATION
Serving as a volunteer for the alumni chapter is a substantial commitment to William and Mary, but should not be overwhelming. The William and Mary Alumni Association will provide strong and comprehensive support that includes:

- Training: You will be provided with training and chapter resource materials. Extensive guidance is offered through your Alumni Association staff liaison, the Chapter Presidents Council meetings and conference calls, and networking with other chapter leaders.
- Board Liaisons: The 21-member William and Mary Alumni Association Board of Directors provides additional support for all William and Mary Alumni Association programs.
- Alumni Association Staff: The Alumni Association staff is available to assist you with your chapter events and projects. Your chapter will have a designated staff liaison as your primary point of contact with the Association, and the College community.
- Volunteer Recruitment: Your Alumni Association staff liaison will assist local alumni volunteers in recruiting and training other chapter leaders.
- Production of Mailings: The staff will work with a chapter representative to develop and design printed chapter newsletters and event invitations using the approved William & Mary Alumni Association design templates. The Association will provide printing and mailing services (including postage) for a limited number of chapter mailings.
- Electronic Communications: Chapters are provided with, and encouraged to use, their designated chapter Web pages on the William and Mary Alumni Association Web site, as these are very effective communication tools. In addition, chapter listservs are
maintained and moderated by the Association staff. Training and staff support will be provided for these communication mediums.

THE HANDBOOK FOR CHAPTER LEADERS

The purpose of this handbook is to provide pertinent information to the chapter board members as they go about the business of operating an alumni chapter. This manual seeks to address the many issues that are common to alumni chapters and to provide clear, practical guidelines. Of course, every chapter and every situation is unique, therefore not everything contained herein is applicable, but we still believe it will be an important tool for the leadership of the chapter. As you put these guidelines into practice, we welcome any feedback or suggestions you may have for improving the resources of this handbook. Your comments and experiences will be valuable to other chapter leaders as well as to us for future revisions.
THE WILLIAM & MARY
ALUMNI ASSOCIATION

II. ALUMNI CHAPTERS
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DEFINED
The William and Mary Alumni Association defines an alumni chapter as a group of William and Mary graduates, as well as former students of the College, living in a defined geographic area who gather to engage in activities that support the mission of the College of William and Mary, the William and Mary Alumni Association and the greater College community.

PURPOSE
The alumni chapters exist to promote the College of William and Mary and foster positive relationships between alumni and their local communities. The chapter network will determine the extent to which some alumni remain in touch with the College, their classmates and fellow graduates. The alumni chapter program is one of the largest and most visible ways in which alumni contribute to the Association, the College and the communities in which they reside.

CHAPTER STRUCTURE
Chapters are chartered by the Alumni Association, and governed by bylaws that are sanctioned by the Alumni Association’s board of directors. Run by local volunteers, who are elected to serve on the local chapter’s board of directors, chapters operate within the structure of the chapter bylaws. For example, the bylaws define the geographic area that makes up the chapter’s territory. They outline the chapter officer structure, establish the schedule for elections and set the criteria for board meetings.

Before bylaws are drafted or a chapter is chartered, it is essential that the Alumni Association staff conduct a thorough analysis of chapter potential including the following criteria:
• The alumni population in the area (we require at least 500 mailable alumni within a 50- mile range in order to charter a chapter)
• The amount of alumni support for a chapter (we conduct a survey, and at least 5% positive response is required)
• The pool of potential volunteer leaders must be identified

STANDARDS OF EXCELLENCE
The William and Mary Alumni Association adopted the Standards of Excellence as a tool to help with the development and growth of alumni chapters. The Standards are a means of measuring the success of an alumni chapter, while giving guidance and direction to alumni chapter volunteers. Divided into three progressive levels: Green (minimum chapter standards), Silver (average chapter performance) and Gold (exceptional chapter success), the Standards lay out the key elements to chapter success.

Each chapter must meet at least the Green level. The Alumni Association staff will work with the alumni chapter leaders to achieve these goals. In the event that the chapter does not meet the Green Level standards, the William and Mary Alumni Association has the right to review the chapter’s charter. In order to be considered eligible for a specific level of recognition, all of the criteria listed should be met. Inability to meet minimum standards will result in the review of the status of the chapter by the William and Mary Alumni Association Board of Directors.

Green Level:
• Recruit local volunteers, representing a diverse range of class years and interests, to serve on chapter board
• Host an organizational event
• Hold regularly scheduled board meetings and report those dates to the staff liaison
• Submit the minutes of all board meetings to the assigned staff liaison.
• Set the chapter calendar for the year
• Coordinate all events with the assigned staff liaison
• Draft and adopt chapter bylaws (based on Association model bylaws, see Appendix)
• Designate a communications liaison to keep the chapter’s Web page on the Association Web site current
• Have dual signatures on the checking account
• Send annual goals to the Alumni Programs office by July 15.
• Send board list to the Alumni Programs office by July 15.
• Send the Statement of Account report, with the bank statement, to the Alumni Programs office by July 15 and January 15 each year.
• Attend the Chapter Presidents Council meetings (fall and spring)

Silver Level (in addition to the criteria from Green Level):
• Implement an annual calendar of activities and submit it to the assigned staff liaison by July 15
• Host three or four events annually (annual meeting and election of officers, Make A Difference Day, an event featuring a College representative, and a special “W&M behind the scenes” event)
• Produce an annual newsletter that announces the calendar of activities and includes a solicitation for dues (if a dues-paying chapter)
• Utilize a basic committee structure
• Have both a Young Guarde and an Olde Guarde representative on the chapter board.
• Offer a Book Scholarship (minimum of $500.00)
• Attend the biennial Alumni Leadership Assembly held by the Association

Gold Level (in addition to the criteria from Silver and Green Levels):
• Host two additional events annually. They should be smaller in scale, such as happy hours, sporting events or casual gatherings
• Collect chapter dues from 5% of area alumni IF the chapter charges dues
• Partner with another chapter (William & Mary Alumni Association or another university’s alumni chapter) to host an activity, help them get their chapter started, challenge them to a sporting event, or assist the W&M Alumni Association with a signature event

CHAPTER PRESIDENTS COUNCIL
The Association recognized the need for the presidents of the local alumni chapters to keep alumni connected to the College and the Association, to provide a direct forum for discussion between alumni chapter presidents, to establish a channel for communication between alumni living at a distance, to encourage the exchange of creative ideas for successful chapter programs and to help determine the future direction of the Association’s chapter policies. Therefore in 2001, the Board of Directors created the Chapter Presidents Council (CPC). The alumnus who is currently serving in the capacity of president of an officially recognized alumni chapter of the William & Mary Alumni Association is a member of the Council. The CPC officially meets at least once a year as required by the Chapter Presidents Council bylaws (see Appendices) but may convene unofficially through conference calls or the Internet via message boards.
III. CHAPTER OPERATIONS

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STARTING (OR REORGANIZING) A CHAPTER

The process of starting or reorganizing a chapter is an arduous task. In order to ensure a successful beginning, it is important to identify strong, dedicated leadership, host organizational meetings to engage interested alumni and plan future activities and finally to implement an action plan to ensure the future of the new chapter.

IDENTIFYING VOLUNTEERS FOR START-UP

After determining that alumni in a geographic area will support an alumni chapter (see Alumni Chapters), the next step is to identify those volunteers who wish to serve in leadership roles since strong volunteer leadership is critical to the success of an alumni chapter. Ask your staff liaison to use the alumni database to search for alumni in the area who:

- Already support the College (financially or through volunteerism)
- Were student leaders or athletes while on campus
- Participate in Association activities, such as Homecoming
- Were active in alumni chapters in other areas, but have relocated to your chapter territory
- Are active in other campus/community activities
- In addition to the list of alumni that the database generates, also consider doing the following:
  - Ask College employees for recommendations (development officers, athletic department staff, admissions officers, etc.)
  - Conduct a survey of alumni in the area and ask for volunteers
  - As alumni agree to volunteer, ask them if they have friends who would like to get involved

Remember, most people are flattered to be asked to take on a leadership role and if you don’t ask, they can’t say “yes”! Don’t assume they are too busy. (See Section III, Chapter Operations for more information on volunteer recruitment).

THE ORGANIZATIONAL MEETING

Once you identify a pool of volunteers, schedule an organizational meeting. At this meeting, the volunteers will begin creating the infrastructure for the chapter by appointing a leader, creating an organizational plan specifically geared towards completing the necessary steps required to petition for charter. It’s important to seek out input from all those involved to create “buy-in” to the chapter structure and goals as soon as possible. Use the Standards of Excellence to determine the group’s initial goals (see Section II, Alumni Chapters, Standards of Excellence). Make sure each volunteer present leaves the meeting with an assignment. It’s a great way to get them committed to the cause from the very beginning.

Discuss potential chapter events and set a timeline for the initial chapter event. Your assigned staff liaison should be actively involved in the planning process for the first event. Focus on the Association’s priority programs – Make A Difference Day, an event featuring a College representative, and a “W&M behind the scenes” special event – as well as your chapter’s annual meeting. Ask meeting attendees to research potential event ideas. Set a date and time for a follow-up meeting to discuss the results of the research projects. Don’t forget to have someone take minutes, so your meeting leader can remind everyone of what they have committed to do.

BEYOND THE FIRST MEETING

When you are organizing (or re-organizing) a chapter, there are a series of steps to implement during the first 12 -18 months.

- Select a leader to serve as the group’s primary contact with the Alumni Association during the organizational meeting
- Take minutes of the meetings (see Appendices for sample minutes)
• Use the Green Level Standards of Excellence to set goals for the first year (see Section II, Alumni Chapters, Standards of Excellence)
• Plan a calendar of events and publicize them using print mailings, the chapter listserv and the chapter Web page (see Section IV, Chapter Reporting)
• Draft and follow bylaws using the Alumni Association’s Model Bylaws (see Appendix).
• Elect officers (see appendix for Model Bylaws)
• Petition for a chapter charter (see Appendix)
• Implement dues structure, build chapter treasury (see Section V, Chapter Finances & Legal Issues)
• Be aware of and submit chapter reports by the appropriate deadlines (see Section IV, Chapter Reporting, Report Due Dates)

Your assigned Association chapter liaison will assist the organizing committee through the steps in the process. The timeline for implementing these steps will vary, depending on the progress of the organizing committee. Once your chapter has accomplished these steps, the chapter should be firmly established and should follow the structure outlined in the “Chapter Operations” section of this handbook.

**Chapter Leadership**

The officers, their terms of office, the process for electing them and an overview of their duties are all outlined in the chapter bylaws. If any questions arise about the election process, or an officer’s performance of his/her duties, the bylaws are the ultimate source of information. If you need assistance interpreting your bylaws, contact your chapter liaison for assistance.

The chapter’s Board of Directors should be elected by the membership. A nominating committee should be appointed to determine the slate, and the membership notified of the election that should take place at the chapter’s annual meeting. The Alumni Association recommends that each chapter elect four officers: President, Vice President, Secretary and Treasurer. Their duties are as follows:

**President**

- Administer and supervise all chapter affairs
- Call all chapter board meetings
- Preside at chapter and board meetings and serve as the official representative of the chapter
- Designate the time for each meeting, see that required number of quarterly meetings are held each year and see that the required quorum is met.
- Serve as the liaison between the chapter, the William & Mary Alumni Association, and the College
- Direct a review of the bylaws biennially
- Serve as a co-signer on the chapter checking account
- Serves as ex-officio of all committees

**Vice President**

- Perform the duties of the president in his or her absence
- Organize a review of the bylaws biennially
- Fulfill special tasks requested by the president
- Serve as chair of the membership committee
- Work to actively recruit new members
Secretary
- Conduct all chapter correspondence
- Keep minutes of chapter and board meetings and send them to your chapter liaison at the Alumni Association
- Maintain chapter roster (include address, telephone, e-mails), send updates to the Alumni Records office
- Notify your Alumni Association staff liaison of new chapter members
- Send notices of chapter meetings to all members
- Function as a historian for the chapter
- Ensure proper publicity for chapter functions
- Send the Association liaison names of all new officers and board members immediately following elections
- Keep chapter Web site updated*
- Administer listserv correspondence*
(*These tasks may be assigned to a communications liaison)

Treasurer
- Receive, handle, deposit all chapter monies in a bank account authorized by the chapter board of directors
- Collect chapter dues
- Pay chapter bills promptly, and resolve payment of any debts approved for payment by the president
- Submit a financial report at each business meeting
- Submit a statement of account to the Association in July and January
- Keep dues payers list current and send to staff liaison.
- Serve as a co-signer on the chapter checking account
- Record registrations for events and send to staff liaison after the event

Officer Transition
The chapter officers and board members should have a notebook with basic information about the operations of the chapter. These notebooks should be handed down from the outgoing officer to the incoming officer in order to ensure that some of the historical references are retained. Make sure the incoming officers review all the information in the notebooks before they officially take office.

The list that follows provides some guidance regarding what should be included to ensure a smooth transition from one administration to the other.

Officer’s notebook:
- Chapter bylaws
- Standards of Excellence
- Statement of Expectations
- Job descriptions of officers
- Resource or contact list of important people
- Chapter member contact information including e-mails
- List of chapter goals
- Evaluations of past projects
- Financial records (treasurer)
- Meeting minutes and agendas (secretary)
- Chapter calendar
In addition to the information contained in the notebook, it would be helpful to facilitate the transition process by having outgoing and incoming officers answer the following questions on paper prior to the transition. During the scheduled meeting or retreat, the outgoing officer and their incoming counterpart should review their responses and answer any additional questions that may arise. (If it is not feasible to have a scheduled meeting, the outgoing officer should schedule a meeting with their incoming counterpart.)

Outgoing Officers:
- Describe the duties of the office
- Biggest frustration and how it could it be avoided in the future
- Biggest success in this office
- Your goals, whether they were met and why
- The executive board’s biggest success this year and what led to this achievement?

Incoming Officers:
- Describe the duties of the office
- Questions for the outgoing officer
- Your goals for this office
- Your plan to work effectively with the other members of the executive board

Smooth Transition Tips
- Elect officers one month before installation to provide an overlap period for new and old officer to work together
- Fill in the gaps for the new officers by asking yourself what you wished someone had told you a year ago
- Review and make current, if necessary, your constitution and bylaws to reflect changes made during your administration
- Review job descriptions to make sure they accurately describe the offices your organization needs and uses
- Set up a transition meeting or retreat
- Review your mailing list or membership records to make them current

Statement of Expectations for Alumni Volunteers
- Commit to maintaining and strengthening the bonds that exist between the alumni and the College.
- Become educated about the programs, services, structure, goals and objectives of the College of William and Mary and the William and Mary Alumni Association. Pledge to support them, and to promote the welfare of the College, the Alumni Association and the greater College community.
- Serve your elected term. A full term is three years, beginning with the meeting immediately following your election.
- Attend all chapter board meetings. If you represent a chapter that charges dues, pay your dues promptly. Participate in chapter activities and attend chapter events. Cultivate and recruit chapter members and volunteers.
- Be an active advocate for William and Mary in your community.

Leadership and Membership Diversity
The ideal chapter board will consist of members ranging across various decades and a variety of interests. This will provide different perspectives that will allow for events that appeal to the entire population. Each chapter board should include a Young Guarde member, Olde Guarde member, and a local Tribe Club member, if there is a club in the area.
YOUNG GUARDE MEMBERS
The Young Guarde is comprised of members from each of the five most recent graduating classes of the College. They have the most recent connection with the College and can provide information about the activities taking place on campus. Your chapter can reach out to Young Guarde members in a variety of ways:

• Personally contact new graduates and extend an invitation to a chapter event through phone, e-mail or letter
• Establish “welcome wagon” kits for new graduates
• Host a special “Young Guarde” event in your area
• Appoint a Young Guarde member to each committee to get their perspective and to encourage participation
• Key in on the recent graduates who were members of the Student Alumni Council. These graduates have already shown an interest in, and are familiar with, the Alumni Association

OLDE GUARDE MEMBERS
The Olde Guarde is comprised of all alumni whose identified class has already celebrated its 50th reunion. Most Olde Guarde members have fond memories of the campus as a small community, where everyone knew everyone else. Your chapter can reach out to Olde Guarde members if you:

• Offer to pick up older alumni and drive them to the event
• Assign a “buddy” to check in with their older alumnus periodically
• Plan events with an educational or cultural focus

TRIBE CLUB MEMBERS
The Tribe Club is a group of alumni and friends of William and Mary athletics that was established to create greater support for student athletes in their pursuit of academic and athletic excellence. Your chapter can connect with Tribe Club members if you:

• Plan activities around William and Mary athletic events. Check the athletic department Web site at http://www.tribeathletics.com/ to see when Tribe teams are playing in your area
• Find out which Tribe alumni are playing on professional teams in your area. Organize a group to go see the team in action, or arrange a viewing party at a local venue
• Contact your chapter liaison for additional assistance

DEVELOPING A RECRUITMENT PLAN
Identify the number of volunteers you need in order to implement the program, the number you should recruit (a higher number), and the deadline for recruiting them. Develop a recruitment timeline that has the least amount of lag time between recruitment, training, and program activities.

• List the characteristics that volunteers need to successfully fulfill their roles
• Identify barriers that could deter people from volunteering and ways to overcome those barriers
• Develop a recruitment message and a volunteer job description
• Create recruitment materials that are readable, inviting, and professional
• Brainstorm a long list of possible recruitment strategies, select appropriate recruiters (and, perhaps, a recruitment coordinator), and shape recruitment plans to match personal style
• Enlist board members, volunteers and your staff liaison as assistant recruiters.
• Utilize diverse methods of print and electronic media and word-of-mouth networks to increase community awareness of the program. Target mailings to local alumni
• Make sure your board is ready to provide “good customer service” when people respond to your recruitment efforts

**RECRUITING VOLUNTEERS**
Volunteers usually have to be recruited or searched out. Before a recruitment drive, prepare a written analysis of:
• Why you need volunteers
• The kinds of activities they will perform and for how long (estimate the length of commitment)
• The number of volunteers needed
• The personal qualifications, physical demands, and skills needed for the different volunteer jobs
• A plan of orientation, evaluation, and recognition for volunteers.
• What the benefits are to the volunteer

Also prepare written job descriptions. No volunteer should be recruited unless there is a specific useful job for that person to do.

**HOW TO KEEP VOLUNTEERS ENGAGED**
• After recruiting volunteers, find or develop opportunities for them to get involved right away. Have clear goals and expectations of what a volunteer will do
• Be flexible – schedule volunteer projects and meetings on weekends and weekdays, mornings and evenings. This kind of diversity of opportunity will enable volunteers to balance work, family and service
• Make sure volunteers understand the importance of the task they are doing, and how it fits into the overall chapter
• Never allow people to feel that you wasted their time or that they weren’t really needed
• Provide a structure so that those who want to, can take on roles of greater responsibility
• Give honest and sincere praise, say “thank you,” make people glad they came and participated
• Recognize volunteers in speeches, media, meetings, etc
IV. Chapter Reporting

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One Alumni Drive
P.O. Box 2100
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757.221.1174
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IV. CHAPTER REPORTING

UPDATING ALUMNI RECORDS
Complete and accurate records are vital to the success of the Alumni Association and consequently, to its chapters and constituent groups. Records include home and business addresses, e-mail addresses, phone numbers, employment title, spouse name, etc.

Alumni chapters can perform an important service for the Alumni Association by assisting in the record updating process. Person to person contact through chapter activities provides opportunities not always available to the Alumni Association. Chapter officers can help:

- Encourage alumni to update their personal information with Alumni Records at www.wmalumni.com.
- At events, gather contact information on the alumni attending including full name, class year, home and business addresses and phone numbers and e-mail. The easiest way to do this is to keep a guest book or collect business cards and hold a drawing at the end of the event.
- Note alumni address changes from chapter mailed items and forward them to the Alumni Records office.
- Forward updated e-mail addresses to the Alumni Records office. This is vitally important, as our e-mail communication continues to increase and print mailings are becoming more cost prohibitive.

Note: An Alumni Association chapter list is never to be used for any commercial or political purpose. It is to be used for Association related purposes only. Directory lists should be refreshed every 30 days. Do not use contact information from a document more than 30 days old.

ALUMNI ASSOCIATION STAFF LIAISON
Your Alumni Association staff liaison is your designated contact with the Association. He or she is your primary contact with the Association and the College. Your liaison is assigned to work with you to help your chapter be successful and to provide you with assistance and guidance as necessary. In order for him/her to be the most helpful to you that they can possibly be, it is important that the chapter keep him/her informed about all aspects of the chapter operations as well as chapter events. Remember that your staff liaison is an ex-officio member of your chapter board and should be included in all board member and chapter communications including but not limited to meeting notices and minutes.

REPORTING DUES PAYERS
Report all dues payers to your WMAA staff liaison after the dues mailer has been sent to your chapter area and then send treasurer’s reports following each meeting whether monthly or quarterly. If a group is receiving complimentary membership (i.e. recent graduates) make your Alumni Association liaison aware so that they are coded as dues payers and will receive the appropriate mailings.

It is important to keep this information up-to-date with your staff liaison so that he/she can make sure alumni are receiving the appropriate information for being a dues payer of the chapter.

CHAPTER REPORTS
The Alumni Association requires its chapters to complete several types of reports. Samples of the report forms are included in the handbook and are available online at www.wmalumni.com
under the Chapter Resources menu. A complete calendar of report deadlines is included below for easy reference.

- The **Annual Chapter Evaluation** report is due on July 15. The outgoing chapter president must complete it before leaving office. This report is used to benchmark the chapter’s performance during the year, as well as to determine the recipients of the Outstanding, Honorable Mention and Most Improved Chapter awards.

- The **Statement of Account** report is due twice a year on January 15th (for the period from July 1 – December 31) and July 15 (for the entire fiscal year). The treasurer should complete these reports, but the president has to sign them as well.

- The chapter’s **goals and calendar of activities for the fiscal year** should be sent to your staff liaison by July 15 each year, therefore the ideal time for a planning retreat would be May. This is a tentative calendar of events and chapter goals. There isn’t a specific report form per se so you may record this in whatever format that suits you. See the Suggested Chapter Calendar in the Appendices for guidance.

- The **Chapter Officer and Board Member Update** forms are due by July 15 and should also be completed as needed any time there is a change in the membership of the board. The secretary should complete and submit these forms.

- The **Event Evaluation** forms are due after each event, and the person responsible for planning the event should file the report with your assigned staff liaison.

- The **Alumni Chapter Book Scholarship Application Form** MUST be submitted prior to April 15 in order for the Financial Aid office to identify students from your area with financial need for the next academic year. Important Note: financial aid packages are determined in the spring in conjunction with the admissions process. Failure to submit your application form and check to the programs office on time will result in the inability to award a scholarship for the next academic year.

- **Chapter meeting minutes** serve as the official record of what took place at the meeting; therefore they should be very accurate. They should be completed by the secretary within a few days after the chapter meeting and sent to your assigned staff liaison. See Sample Board Meeting Minutes in the Appendices for guidance.

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**REPORT DUE DATES**

Submit the following documents to your staff liaison:

**January 15:**
Statement of Account (for July – December)

**April 15:**
Alumni Chapter Book Scholarship Application Form

**July 15:**
Statement of Account (fiscal year)
Annual Chapter Evaluation
Calendar of Events & Chapter Goals
Chapter Officer and Board Member Update

**Due As Needed:**
Chapter meeting minutes (after a chapter meeting)
Treasurer’s Report (after a chapter meeting)
Chapter Officer and Board Member Update (whenever there is a change)
Event Evaluation (after each event)
V. Chapter Finances and Legal Issues
V. CHAPTER FINANCES AND LEGAL ISSUES

CHAPTER FINANCES
All chapters are responsible for managing their chapter finances to ensure that yearly expenses balance in the chapter’s bank account. In contrast, chapters should avoid accruing large bank balances that far exceed their funding needs for the next 12-18 months due to federal tax implications. Alumni chapters fall under the Association’s 501c(3) classification as a charitable entity (as defined by the Internal Revenue Code) and are not allowed to make a significant profit from year to year. It is in the best interest of the chapter, and the Alumni Association, for the chapter to make a contribution to an Association or College program in order to avoid accruing a significant bank balance. Your chapter’s staff liaison can assist you in locating an appropriate program or project for your chapter to support.

NON-PROFIT STATUS
The William and Mary Alumni Association is organized exclusively for the charitable and educational purpose “to aid, strengthen, and expand in every proper and useful way the College of William and Mary in Virginia and its work, and to develop, strengthen, and utilize the bonds of interest, sympathy, and affection existing between the College and its alumni/ae, and among the alumni themselves” and is classified as exempt from Federal Income Tax under section 501c(3), as mentioned above.

TAX EXEMPT STATUS
The William and Mary Alumni Association is recognized as tax exempt by the state of Virginia for both sales tax and franchise tax when contracting for goods used for our tax-exempt purpose. Tax-exempt forms are available from the WMAA and chapters should claim this status from local businesses with which they do business within the Commonwealth of Virginia. Contact your assigned chapter liaison for more information.

INSURANCE COVERAGE
The WMAA carries limited general liability insurance for scheduled activities for chapters or constituent groups, but it excludes events where alcohol is served. We encourage chapters to hold events where an insured caterer or facility provides and serves the alcohol. Otherwise, chapters must rely on the homeowner’s insurance, or the umbrella coverage of the host of the event to provide insurance coverage for the chapter.

SOURCES OF CHAPTER FUNDING
Alumni Association funds to support individual chapter events and programs are extremely limited and are typically restricted to the cost of printing and postage in accordance with the postage policy. Under the direction of the Executive Vice President, funds to help local chapters host events featuring College speakers have been increased, but on a limited basis. Contact your alumni staff liaison for more information.

For the majority of their programming, alumni chapters must rely on dues and event fees to cover their operating expenses. Dues are charged on an annual basis (July 1- June 30), and collected by the local chapter. The chapter board sets the amount of the dues payments. The amounts vary by chapter, depending on the area of the country, but it is advisable to stay around the $15 - $25 per individual member range. It is recommended that several payment tiers be established:
• Single dues payers
• W&M “family” dues (a discount for alumni couples)
• Young Guarde dues (generally dues are greatly decreased or waived for young alumni from the last 5 class years)

Since the fiscal year runs from July 1 through June 30, dues solicitations should be timed accordingly. The treasurer must work with the other officers to coordinate a mail solicitation in the chapter newsletter, as well as reminders on the chapter Web site and in e-mail communication. The treasurer is responsible for maintaining the list of paid members. Many chapters offer incentives to members to encourage dues payments, such as discounted registration fees for special events. For this reason, the treasurer should keep the list of paid members current, and make it available to other officers as needed. Please note, membership dues are not tax deductible. Only donations to the chapter, such as the book scholarship fundraiser, are tax deductible. There are specific steps the chapter must go through to ensure that any tax-deductible gifts are recorded, acknowledged and credited properly. Please contact your Alumni Association staff liaison for more information.

Event fees are based on the actual cost of the event. As stated previously, it is not appropriate for alumni chapters to “make a profit” on chapter programs, so event registration fees should be set based on the actual expenses that will be related to the event (see Section VII, Event Planning, for tips on how to set pricing). It is permissible to charge a few dollars more, just to make sure you don’t go over budget, but the excess funds should be used to fund a College or WMAA program, not to accumulate a large bank account for the chapter. **Doing so is in violation of the IRS standards for non-profit organizations.**

As an alternative to charging the full event expense to the attendees, some chapters try to underwrite the cost of chapter events by soliciting individual or corporate sponsorships. In order to do so, the chapter officers must first obtain approval from the Alumni Association before sponsors are contacted and secured. While sponsorships are not prohibited and can provide valuable revenues to the chapter, it is important that the sponsors are closely aligned with the values and the missions of the Association as a whole.

**CHAPTER CHECKING ACCOUNT**

Each chapter should maintain a checking account for the purpose of handling all fiscal obligations. A tax identification number (TIN) will be required by the bank in order to open an account. Contact your staff liaison for the Alumni Association’s ID number. You should use it on all chapter accounts. **Do not open a chapter bank account using your own tax identification number (your Social Security number).**

Both the chapter president and treasurer must be required to sign off on all withdrawals from or drafts against the chapter’s account. The **chapter treasurer must deposit all monies collected on behalf of the chapter into the chapter’s checking account within 72 hours of receipt.** Therefore, the chapter treasurer must maintain the records of all transactions to and from this account.

The monthly bank statement should be mailed directly to the treasurer, who must reconcile it monthly in preparation for his/her financial report at the chapter’s board meetings.

**REPORTING REQUIREMENTS**

As part of the chapter’s responsibility to the Association, the treasurer must submit a completed Statement of Account form (provided by the Association) and a current bank statement to the Alumni Programs office twice a year. The first report is due on January 15 each year and should include chapter activity from July through the end of December. The second report is due on July 15 each year and should include activity for the entire fiscal year. Failure to submit this
form, regardless of the status of the chapter’s account, will result in suspension of all mailing privileges until the Office of Alumni Programs receives the signed financial form. This policy is a legal requirement under the Association’s not-for-profit 501c(3) classification, and must be disclosed as part of the financial statements annually for auditing purposes.

Each chapter is also required to complete an Annual Budget Worksheet, and submit it to its assigned staff liaison. The worksheet is a tool designed to help chapter members plan effectively for the year, and should be completed in conjunction with the calendar of events for the year.

**CHARITABLE DEDUCTIONS**

When alumni contribute toward a chapter event or activity either by paying for all or part of a particular expenditure or by paying for their travel expenses incurred as a result of their volunteer service to the organization AND it is not reimbursed by the chapter or the Association, they may claim gift credit by using the Charitable Deduction Form which is available online and in this handbook (VIII. Forms). This form **must** be completed and returned to your chapter liaison for verification and processing. Documentation and receipts will be required. It is possible to earn gift credit for a range of programs, including gifts to the chapter’s book scholarship fundraising program. Please consult your assigned chapter liaison for the most current information about gift credit processing.

**FUNDRAISING**

Some chapters depend on fundraising to support chapter programming and special projects.

- **DO** tell alumni and chapter supporters how the funds will be used. Monies collected via dues are not tax deductible.
- **DO** select a cause that has meaning for chapter members, particularly a College or community-related project.
- If appropriate, **DO** report gifts for chapter or Association-related projects via the Charitable Deduction Form so that the donor will get the appropriate tax deductibility acknowledgement and gift credit from the College.
- **DON'T** assume that donations to every project will be deductible. If in doubt, consult your chapter liaison or the Director of Business and Budget Management at the Alumni Association.
The William & Mary Alumni Association

VI. Event Planning

Alumni Programs & Special Events
One Alumni Drive
P.O. Box 2100
Williamsburg, VA 23187-2100
VI. EVENT PLANNING

CHAPTER EVENTS
Let’s get started! The key is to not over-program but to offer events that appeal to a wide audience. It is not always necessary to create something from scratch. Piggyback on an existing event but give it a W&M twist. Listed below are the four specific types of events each chapter should host with a list of examples.

W&M “BEHIND THE SCENES” EVENT
This type of event is organized around a unique opportunity to which only W&M alumni and their guests will have access. This could be anything from an exclusive preview of an art exhibit or a private meeting with the artists after a local theater performance. Such events are typically well attended.

Where do I start?
• Identify a local alumnus who works at a special venue such as a museum, theater, philanthropic organization or who knows an artist, professional racecar driver, etc.
• Once the event idea is determined, the chapter president or the WMAA staff liaison should make contact with the alumnus to facilitate such an event
• Once the details are in place, promote this event

Examples of this type of event previously coordinated by alumni chapters include:
• Behind the scenes tour of Joe Gibbs’ racing facility in Charlotte, N.C.
• Private tour of TV station KDKA in Pittsburgh, Pa
• Palettes & Pork – picnic and tour at the art studio of local artists in Smithfield, Va.
• Behind the scenes tour at Colonial Williamsburg’s Bruton Heights School Education Center

MAKE A DIFFERENCE DAY
Make a Difference Day is The College of William and Mary’s largest one-day community service event. Each year, in October, student volunteers complete more than 40 projects in the Williamsburg area. The Alumni Association, in conjunction with the College, hopes to make this a nationwide William and Mary volunteer service day. Contact your chapter liaison for the date of this year’s service day.

How do I find a project for our chapter?
• Contact the local Red Cross for assistance.
• Inquire at local churches about ongoing projects with which you can assist.
• Visit www.volunteermatch.org, a site that helps to identify volunteer opportunities and ranks them by the type of audience for which they are appropriate.

Remember to market this volunteer program to your chapter and alumni population in the area so that you have a large enough group for the chosen project. As you volunteer in your community, show your Tribe pride by wearing green and gold. Remember to take pictures and post them on your Web site.

Consider continuing with the same organization in succeeding years if you wish to build a tradition or change to a different volunteer opportunity if you want to broaden your contribution to the community. Either way, you are building a NEW William and Mary tradition.

WILLIAM AND MARY GUEST SPEAKERS
The Alumni Association is committed to bringing the College experience to our alumni membership. Your chapter liaison will work with you to coordinate guest speakers from the campus – faculty members, administrators and staff – for a chapter event at least once a year. This offer is subject to the availability of the speakers, and we recommend that you plan at least six months in advance, particularly if you live outside Virginia. Contact your chapter liaison for more information.

**ANNUAL MEETING**

Don’t forget to add your chapter’s annual meeting to your agenda! Many chapters combine a spring picnic or dinner with a guest speaker and include their annual business meeting to the agenda. You can also combine your annual meeting with one of the miscellaneous events listed below. The election of board members and officers is usually brief, allowing attendees to have a role in the chapter’s operations in addition to the festivities.

**MISCELLANEOUS EVENTS**

Other programs your chapter may want to consider adding to its annual calendar of events:

- **An Annual Picnic** is a very popular family-friendly or multi-generational event. Ideal locations include a local alumnus’ home or a pavilion at a local park preferably with water access like a pool, lake, river or ocean. Keep the ticket price low and consider offering a family rate so that the whole family can come without breaking the bank. Perhaps the chapter can pay for the main dish and/or beverages and the attendees can bring a side dish or dessert to share.

- **A Holiday Gathering** is a nice time for chapter members to get together although it is a busy time of year. If your chapter wants to host a holiday event, but is concerned about schedule conflicts during the busy holiday season, consider holding a Twelfth Night party in January instead of the traditional month of December. However if a December date is necessary, consider planning it around the College’s tradition of the Yule Log ceremony.

- **Welcome Incoming Freshmen** either by hosting a social gathering such as the annual picnic (see above) or through a chapter care package. Chapter members can assemble a care or exam package and send to each student from their chapter area in or at the end of the semester right before exams. This is a great way to help the students appreciate the lifelong connection with the College.

- **Welcome Graduates to the Area** by extending a special invitation to them to join in your chapter’s activities. Young Guarde alumni are often enthusiastic and eager to become active alumni – they just don’t know how to go about getting involved! Reach out to them, and plan events that appeal to younger alumni.

- The key to a successful **Happy Hour(s)** is to keep it on the same day or date of every month, such as the first Thursday of every month. This event is great for increasing membership, particularly among younger or single alumni. While Happy Hours don’t appeal to everyone, they can be an important part of a BALANCED chapter calendar.

- An alternative to the traditional Happy Hour is **First Tables**. This event is a casual, pay-your-own-way dinner gathering at a local restaurant. The key is to have the assigned alumni host who collects RSVPs communicate with the restaurant to reserve space and greet the attendees when they arrive. A First Tables gathering can be a success, no matter how many alumni attend. Five people can have just as much fun as twenty-five!

Make sure at least one board member is in attendance at each event with a sign-in sheet, and follow up with the attendees to invite them to other chapter events.

**CHOOSING AN EVENT SITE**
There is a wide range of factors to consider when selecting a site for a chapter event. Keep in mind that you want to meet as many of these criteria as possible. We suggest that chapters alternate event venues to appeal to a variety of alumni. Remember to keep your target audience in mind as you consider these factors:

Schedule
- Weekend versus weekday
- Time of day

Location
- Downtown versus suburban venue
- Inside or outside

Venue
- Rental fee and deposit
- Size
- Parking
- Handicap accessible
- Adjacent to main event (if a pre- or post-event)

Room Set Up
- Number of guests
- Seating
  - Table size and shape
  - Table configuration
  - Number of tables
- Head table
- Additional tables (i.e. registration, display or information)
- Stage or riser
- Table or room decoration

Audiovisual needs
- Podium and sound system
- Projector and screen

Food and beverage
- Pre-event (i.e. cocktail hour or hors d’oeuvres)
- Service style (i.e. served, buffet, reception)
- Bar Service (i.e. open, consumption, cash bar or corkage fee)
  - Full bar or beer and wine only
  - Bartender fee
  - Number of bartenders (typically 1:75)
- Catering Order
  - Price per meal including tax and gratuity
  - Minimum number/price guarantee
  - Final count date
  - Additional charges (i.e. linens, bartenders, china rentals)

Hospitality
- Greeters
- Nametags, place cards or sign-in sheets
- Giveaways or favors

**EVENT SUPPLIES**
For every chapter event, you need a set of basic event supplies. Keep these on hand at all times:
• A registration list or sign-in sheet so you can capture names, class years and new or updated contact information. This is a great tool to help you follow up with event attendees, so you can invite them to your next event!
• Nametags – either pre-printed with names and class year or handwritten at the event. You can request William & Mary Alumni Association nametags from your assigned chapter liaison. If using pre-printed nametags a list of names is needed one week in advance
• Napkins – available with the William & Mary Alumni Association logo from your assigned chapter liaison
• Something green and gold to help alumni find your group in public places. Balloons, banners, pompoms, hats and pennants work well
• Signage makes it easy to find members of the group in public settings

For more structure in your event planning, use the Event Organizer’s Checklist found in the Appendices.

**EVENT COSTS/BUDGET**

When planning for an event, there are many things to consider in terms of the costs and how those costs will be paid. Below is a step-by-step guide to planning the budget for an event.

Contact vendors to determine the fixed and variable costs for room rental, catering, service staff, etc. Be sure to ask about the minimum-booking fee, required by some venues to ensure profit.

Decide how much money the chapter can contribute to cover costs for the event.

Determine what the chapter will pay for and what will be charged to the guests. For example, for a dinner event, the chapter may want to pay for the room rental and the catering, but have guests pay for a cash bar. Or, the chapter may wish to charge one all-inclusive fee considering all costs, both fixed and variable. Pay-as-you-go events are also an option as the chapter can provide a venue at no cost, and the attendees pay their own expenses.

Determine how much the chapter can afford based on the available funds and the minimum projected attendance at the event. Crunching the numbers will help you decide how much you need to charge for admission.

For example, your chapter wants to throw a holiday party. The chapter has $2,000 to contribute to the costs. You project that 100 people will attend. Your venue charges a $200 rental fee for a private room, and $20 per person for food only. The venue is willing to offer a flat fee of $3 per drink served at the bar. You estimate three drinks per person, for a liquor fee of $9 per person.

Your total cost per person is $29 before tax and gratuity as well as the $200 room rental fee. So:

\[
100 \text{ guests} \times 29 = \$2,900 \\
\text{Room Rental Fee} = \$200 \\
\text{Gratuity} @ 18\% = \$558 \text{ (gratuity is taxable in most cases)} \\
\text{Tax} @ 10\% = \$365.80 \\
\text{Total costs} = \$4,023.80 \\
\text{Minus Chapter Contribution} = \$2,000 \\
\text{Cost to cover} = \$2023.80
\]

The chapter will need to charge a minimum of $21 per person to cover the cost of the event, assuming 100 guests. **WMAA strongly advises chapters to collect payment in advance of events.**
THE WILLIAM & MARY
ALUMNI ASSOCIATION

VII. COMMUNICATION
VII. COMMUNICATION

PRINT VERSUS ELECTRONIC COMMUNICATION
As long as there have been chapters, there have been printed mailings, originating from Williamsburg, mailed to alumni to notify them of upcoming events and meetings. With the advent of new technology, chapters (and the Association) are choosing to communicate with alumni electronically. However, there are some alumni who prefer the traditional method of communication or do not have access to the Internet or e-mail. Therefore, it may be necessary to continue to produce traditional mailings for Association or chapter communication.

EVENT MAILINGS
The Alumni Programs and Special Events office has several examples of invitations and event flyers in styles and formats approved by the Association. The half-page styles are formatted for printing on card stock as self-mailers while the full-page styles are folded and tabbed. For examples, contact the Programs office. Work with your staff liaison, to initiate any William & Mary Alumni Association produced chapter mailings.

ANNUAL/DUES NEWSLETTER
The annual/biannual mailing is the most important marketing tool your chapter will have all year. It is essential that your mailing materials be as simple and effective as possible. In general, dues mailings include the following:

• Letter from the president – include wrap-up of previous year and plan for coming year
• Upcoming events calendar/registration – include list of events for the coming year, and highlight and register alumni for the first event of the year or a signature event
• Dues Remittance Form – includes explanation of how chapter money is spent, and what members get in return
• Survey – an option you might consider if the chapter board hasn’t surveyed local alumni recently
• Items of special interest to alumni in your area. Include articles and photos from previous events, articles about book scholarship recipients, and other College events in your area

TIMELINE FOR AN ASSOCIATION PRINT PROJECT
It takes approximately 6-8 weeks for the Alumni Association staff to produce and mail your newsletter. The steps involved in the process include:

• Ordering the mail file of alumni address information and count for printing purposes
• Laying out the text provided by the chapter using an approved Association template
• Writing and researching items for the newsletter (as needed)
• Proofreading (every newsletter is proofed by the Alumni Programs and Communications staffs)
• Making corrections to the text
• Copying the newsletters
• Folding and tabbing the newsletters
• Running the newsletters through the postage equipment

Due to the cost of postage, most chapter mailings are sent via third class mail. You must allow at least three weeks for delivery by the post office. Please keep this in mind as you
plan your chapter calendar for the year and set your RSVP deadlines. Submit your mailing information as soon as possible, as the staff must coordinate multiple chapter mailings, and projects are completed on a first come, first served basis.

MAILING LABELS
The Alumni Association will provide your chapter with an area alumni directory and mailing labels upon request. Please submit your request directly to the Alumni Programs office. Such rosters and labels should only be requested when needed as it costs the Association time and money to produce these lists. The information contained in these lists are confidential and only to be used for official chapter business.

WEB SITES
Each chapter must maintain a Web site, provided by the WMAA. Web sites are provided at no cost to the chapters to communicate with their alumni population and market their events in a timely and efficient manner. All chapter Web sites are accessed through the William & Mary Alumni Association’s Web site or directly using the following Web address configuration: www.wmalumni.com/“chaptername”.

With a Web site, your chapter will be able to:

- List board members
- List dues paying chapter members
- Post information on events
- Post photos
- Upload documents, such as dues and registration forms, minutes of each board meeting and previous and current newsletters
- Conduct alumni poll
- Participate in the electronic business card exchange
- Post questions and answers on chapter message board

What not to post:

- Financial information – treasury report
- Phone numbers and home addresses
- Advertising of any kind by outside vendors or for individual alumni businesses

The Web site template is set up for the chapter with privileges and user access given to the designated Web content manager, typically the chapter secretary or communication chair. To begin developing the site, the designated chapter Web manager must contact the Alumni Communications department to obtain the needed password and instructions. Because the Alumni Association provides this service, chapters are strongly discouraged from maintaining a Web site separate from the WMAA site.

E-MAIL DISTRIBUTION
In addition to providing chapter Web pages and bulk mail, the Association can provide a vehicle to send e-mails to all alumni within a chapter area who have current e-mail addresses on file with the Alumni Records department. Each chapter will have a listserv that will contain all the e-mail addresses for alumni within the chapter geographic area. The secretary of the chapter will have access privileges to send messages to this list. Following are some suggestions for how to format a message:

- Use a catchy subject line that includes the phrase “W&M” and the chapter name
- Use plain text so that e-mail filters and spam blockers do not prevent alumni from getting messages
• Avoid using photos in listserv messages for the same reason. You can always post the photos on your chapter Web page or include a link in your e-mail message.

**ALUMNI eCONNECTION**
The William and Mary Alumni Association publishes a monthly electronic newsletter, the *Alumni eConnection* that includes news and announcements regarding the College and the Alumni Association. Usually, the *eConnection* is sent on the second Friday of each month to all alumni with valid e-mail addresses. To submit an event for this newsletter, please send information to alumni.magazine@wm.edu by the first Friday of each month.

**ALUMNI MAGAZINE**
The Alumni Association also publishes the William and Mary Alumni Magazine three times per year. The magazine is sent to all alumni, graduate students, parents of current students and friends of the College. Chapters are invited to submit event photos including the names of those pictured along with a brief event description including the date, location and name of the event. Photos are selected at the discretion of the Alumni Communications department, and space in the magazine is limited.

**WRITING A PRESS RELEASE**
Many local publications accept press releases from alumni chapters, as a means of publicizing local events. To create a press release, follow these instructions:

• Your page heading should read “For Immediate Release”
• Leave the next several lines blank.
• Contact: List the name and phone number of your chapter publicity person. Include your Web site so that media agencies can go there for more information.
• Headline: Include a concise headline in bold face.
• Body: Start with a parenthetical notation containing the location and date of the release. In the text of the release, include information about the type, date and time of the event. Mention who is sponsoring the event (your local chapter and the William and Mary Alumni Association) and talk about who can attend, how to register, and how much the event will cost. Be sure to include the RSVP deadline.
• Further incorporate information about who is involved (speaker, performing group, etc.) and include the title or name of the event. In succeeding paragraphs, expand on the event’s topic or theme. If it is a social or benefit event, give the history of the event. If it is a speaker event, include brief comments on the lecture topic (gleaned from prior publications, news releases and interviews) and a little biographical information on the speaker.
• End: Indicate for the reader the conclusion of your official release with three number symbols (# # #) centered on the page.
• Make sentences clear and paragraphs concise. Keep paragraphs short. The entire press release should be less than one page long.

Once created, send the release to your local newspaper at least one month prior to your event. This will allow time for the announcement to run once or multiple times prior to the event. Remember, this type of information is typically used as filler so there is no guarantee it will be published. If submitted for a calendar of events listing, it is more likely to be published.
VIII. Forms
1. Statement of Account
2. Board Member/Chapter Office Update form
3. Annual Chapter Evaluation
4. Chapter Book Scholarship Application Form
5. Charitable Deduction Form – Travel
6. Charitable Deduction Form - Miscellaneous
7. Event Evaluation form
STATEMENT OF ACCOUNT
FISCAL YEAR JULY 1, 20_____ - JUNE 30, 20_____  

Name of Chapter__________________________________

___ Yes, our chapter currently maintains a bank account. (Complete this form and return to the William & Mary Alumni Association. Please attach a copy of the bank statement, reflecting the bank balance as of June 30th).

Name of Bank: __________________________________ Account Number: __________________

___ No, our chapter does not maintain a bank account. (Do not complete this form; **DO** return it to the Alumni Association.)

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REQUIRED SIGNATURES OF TWO (2) OFFICERS

Print____________________________________  Print___________________________

Signature________________________________  Signature_____________________________

Title___________________________________  Title___________________________________

Date___________________________________  Date___________________________________
REMINDER: This statement of account must be received by the William & Mary Alumni Association NO LATER THAN JULY 15th to prevent the loss of mailing privileges. NO EXCEPTIONS WILL BE MADE.

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Record final balance from page 2 in the appropriate box on page 1.
Board Members for the _____________________ Chapter
for 20___ - 20___

Please **print or type** the information requested and return to the William & Mary Alumni Association, Alumni Programs, P.O. Box 2100, Williamsburg, VA 23187-2100.

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<th>Name &amp; Class Year</th>
<th>Past Offices Held (if any)</th>
<th>Home Address</th>
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<th>Daytime Phone</th>
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Submitted
Date Submitted: ____________________________

(List Chapter Officers on reverse)
Chapter Officers for the __________________________ Chapter
for 20____ - 20____

Please print or type the information requested and return to the William & Mary Alumni Association, Alumni Programs, P.O. Box 2100, Williamsburg, VA 23187-2100.

<table>
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<tr>
<th>Name &amp; Class Year</th>
<th>Officer's Title</th>
<th>Home Address</th>
<th>Home Phone</th>
<th>Daytime Phone</th>
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Submitted
Date Submitted: ______________________

(List Board Members on reverse)
ANNUAL CHAPTER EVALUATION
(Outstanding, Honorable Mention and Most Improved)

JULY 1, 20__ - JUNE 30, 20__

CHAPTER NAME ________________________________

I. OFFICERS

<table>
<thead>
<tr>
<th>Officers</th>
<th>Name</th>
<th>Class Year</th>
<th>Term Beginning</th>
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II. BOARD OF DIRECTORS

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<th>Office Held</th>
<th>Name</th>
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List any ex-officio members of the board who serve as liaisons to College or Alumni Association’s alumni groups (Tribe Club, AAN, Young Guard, etc.):

________________________________________________________________________

________________________________________________________________________

REMINDER: This evaluation MUST be received by the William & Mary Alumni Association NO LATER THAN JULY 15 and MUST be accompanied by the annual Statement of Account and bank statement to be considered. NO EXCEPTIONS WILL BE MADE.
III. GENERAL INFORMATION ABOUT CHAPTER

A. If you are a chapter with fewer than 1,000 alumni in your area, does the chapter solicit dues?  □ YES  □ NO
   If YES:  $_____ per person  $_____ per couple  $_____ per family  $_____ per Young Guarde

   How many current dues payers do you have?
   How do the members benefit from paying dues?
   How does the payment of dues benefit the chapter?

IV. EVALUATION QUESTIONS

A. What were the goals of the chapter for this fiscal year?

B. How did you achieve those goals?

C. In what ways or in what areas has the chapter improved over the last year?

D. How many times did the Board of Directors and/or officers meet during this fiscal year?
   When did your annual meeting take place?
   How were new officers and board members selected for the coming year?
E. What was the greatest chapter success of this fiscal year? Why?

F. How has your chapter planned for leadership succession? Please describe any orientation or training procedures you currently have in place to properly prepare board leaders.

V. OTHER

1. How can the Alumni Association better assist your chapter and you as a chapter leader?
VI. ITEMIZATION OF ACTIVITIES

Use the following codes to indicate Type of Event in the appropriate column:
(SOC) Social; (ATH) Athletic; (EDU) Educational; (CUL) Cultural; (ADM) Admission;
(CC) Career Counseling; (CS) Community Service; (FUN) Fundraising; (POL) Political Awareness

Use the following codes to indicate Publicity Used in the appropriate column:
(F) Flyer; (T) Telephoning; (PR) Press Release; (E) E-Mail; (W) Website

<table>
<thead>
<tr>
<th>Name of Event</th>
<th>Date of Event</th>
<th>Type of Event</th>
<th>Total Attendance</th>
<th>Publicity Used</th>
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To list additional events, please attach a separate sheet of paper and include all of the information as indicated for each event.

REMINDER: This evaluation MUST be received by the Alumni Association NO LATER THAN JULY 15 and MUST be accompanied by the annual Statement of Account and bank statement to be considered. NO EXCEPTIONS WILL BE MADE.
ALUMNI CHAPTER BOOK SCHOLARSHIP
FOR ACADEMIC YEAR – FALL _______ - SPRING _______
APPLICATION FORM

Chapter _____________________________________ President _____________________________

Mailing address
_______________________________________________________________________________

Daytime phone ____________________________________________

Scholarship amount: $ ____________________________

Selection criteria (What basis would you like the financial aid office to use to select the student? Check all that apply.)

_____ Need  _____ Merit  _____ Class year (preferred)

_____ Resident of chapter area  _____ Other (explain) ________________________________

NOTE: Payment in full of scholarship funds MUST accompany this form and be received on or before April 15. Make checks payable to: The William & Mary Alumni Association

Signature __________________________________________ Date ___________________

Return to:
Attn: Book Scholarships
The William & Mary Alumni Association
P.O. Box 2100
Williamsburg, VA 23187-2100
THE WILLIAM AND MARY ALUMNI ASSOCIATION

TRAVEL EXPENSE CHARITABLE DEDUCTION FORM

FOR USE IN ACCUMULATING TAX-DEDUCTIBLE TRAVEL EXPENSES INCURRED IN CONNECTION WITH SERVICES PROVIDED TO THE ASSOCIATION

If you would like a verification of your participation and the amount of your travel expenses for your tax records, complete this form, and after verification by the William and Mary Alumni Association, retain it with your income tax records. Depending on the activity, a portion or all of the expenses may be deductible; please consult your accountant or other tax preparer to determine the actual deductible amount. Please submit copies of receipts documenting any expenses in excess of $75 with this form and retain the originals for your records. Please also attach copies of any documentation that supports the charitable purpose of the expenditure. Printed or email copies of schedules, agendas and announcements of meetings, activities, and programs are all excellent supporting materials.

Name ___________________________  Trip Date(s) ___________________________
Address ___________________________  Volunteer Position ___________________________
Alumni Association Event/ Purpose for Expenditures ___________________________

TRANSPORTATION: From ___________________________  To ___________________________
Auto: # of miles ___________________________ at $0.14 = ___________________________
Auto Rental: ___________________________  Airfare: ___________________________
Tolls: ___________________________  Other Means: ___________________________
Parking: ___________________________

TOTAL TRANSPORTATION: ___________________________

FOOD:  Breakfast (s) ___________________________
Lunch (es) ___________________________
Dinner (s) ___________________________

TOTAL FOOD: ___________________________

LODGING: Location: ___________________________

TOTAL MISCELLANEOUS: ___________________________

TOTAL EXPENSES ___________________________

Signature ___________________________  Date ___________________________

Income Tax Regulation §1.170A-1(g) states that unreimbursed expenditures made incident to the rendition of services to an organization, contributions to which are deductible, may constitute a tax deductible contribution, as may out-of-pocket transportation expenses and reasonable expenditures for meals and lodging necessarily incurred while away from home in the course of performing donated services. Since individual circumstances regarding taxes will vary, personal tax advisors should be consulted regarding appropriate tax-deductible contributions in your case.

VERIFICATION
The above named individual incurred expenses in the amount of $ ___________________________ at the request of the William and Mary Alumni Association for which he/she was not reimbursed.

Karen R. Cottrell ’66, Executive Vice President
The William and Mary Alumni Association
The College of William and Mary
THE WILLIAM & MARY ALUMNI ASSOCIATION

CHARITABLE DEDUCTION FORM

FOR USE IN ACCUMULATING TAX-DEDUCTIBLE EXPENSES INCURRED IN CONNECTION WITH SERVICES PROVIDED TO THE ASSOCIATION

If you would like a verification of your participation and the amount of your expenses for your tax records, complete this form, and after verification by the William and Mary Alumni Association, retain it with your income tax records. Depending on the activity, a portion or all of the expenses may be deductible; please consult your accountant or other tax preparer to determine the actual deductible amount. Please submit copies of receipts documenting any expenses in excess of $75 with this form and retain the originals for your records. Please also attach copies of any documentation that supports the charitable purpose of the expenditure. Printed or email copies of schedules, agendas and announcements of meetings, activities, and programs are all excellent supporting materials.

Name ______________________________ Date(s) _______ Volunteer Position _______________________
Address ________________________________________________________________________________
Alumni Association event/purpose __________________________________________________________

LOCAL TRAVEL EXPENSES: From: ___________________________ To: _______________________

Auto: # of miles ___________ x $0.14 a mile = $ ___________________
Tolls: $ ___________________
Parking: $ ___________________
TOTAL LOCAL TRAVEL: $ ___________________

FOOD: Breakfast (s) $ ___________________
Lunch (es) $ ___________________
Dinner (s) $ ___________________
TOTAL FOOD: $ ___________________

MISCELLANEOUS

Description _________________________________________ $ ___________________
Description _________________________________________ $ ___________________
Description _________________________________________ $ ___________________
Description _________________________________________ $ ___________________
Description _________________________________________ $ ___________________
TOTAL MISCELLANEOUS: $ ___________________

TOTAL EXPENSES $ _______________________

Signature ______________________________ Date _______________________

Income Tax Regulation §1.170A-1(g) states that unreimbursed expenditures made incident to the rendition of services to an organization, contributions to which are deductible, may constitute a tax deductible contribution, as may out-of-pocket transportation expenses and reasonable expenditures for meals and lodging necessarily incurred while away from home in the course of performing donated services. Since individual circumstances regarding taxes will vary, personal tax advisors should be consulted regarding appropriate tax-deductible contributions in your case.

VERIFICATION

The above named individual incurred expenses in the amount of $ __________ at the request of the William and Mary Alumni Association for which he/she was not reimbursed.

Karen R. Cottrell ’66, Executive Vice President
The William & Mary Alumni Association
The College of William and Mary
EVENT EVALUATION

Event __________________________________ Chapter ____________________________

Date __________________________________ Event Planner ______________________

Time __________________________________ Place _____________________________

Address __________________________________ Phone __________________________

E-mail _________________________________________________________________

Alumni Association representatives attending:

________________________________________________

Other College official(s) attending: _________________________________________

Attendance (Approx. No.): Alumni ________ Spouses ________
Students ________ Parents ________
Freshmen ________ Children ________
Friends _________

Key alumni in attendance (chapter officers, Alumni Association BOD, etc.)

Name: ________________________________

_____________________________________________________________________

_____________________________________________________________________

Program (outline of what took place): ______________________________________

_____________________________________________________________________

_____________________________________________________________________

Comments ______________________________________________________________

_____________________________________________________________________

_____________________________________________________________________

Follow up requested of the Alumni Association (materials requested, change of address, etc.):

_____________________________________________________________________

_____________________________________________________________________

_____________________________________________________________________

_____________________________________________________________________

_____________________________________________________________________

_____________________________________________________________________
EVENT EVALUATION

Is this event worth repeating for your chapter? Yes □ No □
If no explain ..................................................................................................................

Would you suggest this event for other chapters? Yes □ No □
Comments ......................................................................................................................

PHOTOGRAPHS:

Enclosed are snapshots with names for use in the Alumni Magazine or other Alumni Association publications □

Digital photos will be sent electronically □

Do you need photos returned to you? Yes □ No □

Additional comments .................................................................................................
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Signature .....................................................................................................................

Printed Name .............................................................................................................

Title ............................................................................................................................

Date ............................................................................................................................

Please mail to:
Alumni Programs & Special Events
P.O. Box 2100
Williamsburg, VA 23187-2100

E-mail: alumni.programs@wm.edu
Fax: 757.221.1186
Attn: Alumni Programs & Special Events
THE WILLIAM & MARY
ALUMNI ASSOCIATION

X. APPENDICES
X. APPENDICES

1. Petition for Charter
2. Tips for Writing Minutes of a Meeting
3. Sample Board Meeting Minutes
4. Model Bylaws
5. Chapter Presidents Council Bylaws
6. Suggested Chapter Calendar
7. Important College Telephone Numbers
8. Important College and Association Dates
Appendix 1

PETITION FOR CHARTER
WILLIAM AND MARY ALUMNI ASSOCIATION

Date

President
Board of Directors
William and Mary Alumni Association
College of William and Mary
P.O. Box 2100
Williamsburg, VA 23187

Dear ________________:
We, the undersigned, do hereby petition the Board of Directors of the William and Mary Alumni Association for recognition as a duly constituted Chapter of the Alumni Association. We realize that the best interests of the Association and the College can be served by an active chapter in which all members recognize their responsibilities to be active participants in all phases of such programs that the chapter undertakes, and to serve in leadership capacities as determined by the members of the chapter.

The name of the Chapter will be the __________________ alumni chapter of the William and Mary Alumni Association of the College of William and Mary in Virginia. It will serve the area of ______________________________. The boundaries are ____________________________ ____________________________________________.

The Board of Directors of the chapter will consist of the following:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Tips for Writing Minutes of a Meeting

• Identify what will be discussed at the meeting.

• Review the agenda including the names of attending participants in order to become familiar with the context of the meeting. The more you know about the upcoming discussions and participants, the more effective your notes will be.

• Use the agenda to format the minutes.

• Before the meeting begins, prepare a template with the agenda and leave plenty of space for notes. Remember to include all pertinent information, the date and time, agenda, participants, time adjourned, next meeting date, etc. Prepare an attendance checklist especially if you are not familiar with the group or committee.

• Where possible, the note taker should not be a participant. Be impartial and objective. It is very difficult to take minutes of a meeting in which you are participating. As note taker you are not in charge of the meeting, the chairperson is. Your focus must be on capturing the discussion of the meeting, not on leading the discussion.

• Writing minutes is not the same as transcribing. Keep your minutes brief and to the point. The minutes of a meeting should be a snapshot of the discussions and decisions. Effective minute taking does not mean you are recording every word that was said; this could lead to missing important points.

• Attach any documentation given out at the meeting. If any materials or brochures were distributed at the meeting, include copies with the meeting notes.

• Type up minutes as soon as possible. It is good practice to put together a draft of the minutes as soon as possible, while it is still fresh in your mind. The longer you delay, the greater the probability of forgetting something crucial.

• Don’t forget to proofread!

• Be sure to check and double check your draft before sending to the participants. Keep all rough notes until the minutes have been approved.
Appendix 3

Sample Board Meeting Minutes
___________________ Alumni Chapter Board of Directors Meeting
___________________ at the home of William and Mary Smith, Anytown, VA
___________________ May 17, 2006

The meeting was called to order by Chapter President John Anderson ’XX at 7 p.m. Mary Smith ’XX, Kathy Brown ’XX, Phillip James ’XX and Jennifer Weekley ’XX were in attendance.

Chapter Secretary, Jennifer Weekley, presented the minutes of the previous meeting, held on May 4, 2006. The minutes were read and approved.

Kathy Brown, treasurer, gave the financial report. A motion to accept the report was made, seconded and approved.

John Anderson congratulated Mary Smith, and the program committee, on a successful Admitted Student Picnic last weekend. Twenty-eight freshmen attended, along with their families. Mary reported on the program committee’s progress in setting the event calendar for the year. As discussed at the last meeting, the community service project for Make a Difference Day in October has been set, and the call for volunteers should be included in the newsletter. The committee is working with Brooke Harrison from the Alumni Association to secure a campus speaker for February, and the plan for the W&M pre-theater event in May will be finalized as soon as the group tickets become available. The admitted student picnic date for next summer will be Saturday, June 30, 2007 at the Andersons’ home. Phillip added that the Young Guarde group wants to host a Happy Hour on Thursday, November 9, 2006. A motion was made, and seconded, to approve the chapter calendar as presented. The motion passed. A discussion about fundraising for the 2007 book scholarship program followed. Phillip will research options and report them at the next board meeting. John reported that he would attend the Alumni Leadership Assembly in Williamsburg on September 22nd and 23rd. He reminded Kathy that the Statement of Accounts report is due to WMAA by June 1st, and reported that he will be finishing the Annual Chapter Evaluation Report next week. Jennifer is sending an updated officer list to Kristin as the Alumni Association officer. These are all requirements for the chapter’s status according to the Standards of Excellence.

The next board meeting was scheduled for June 15th at Kathy Brown’s house. The meeting adjourned at 8 p.m.
MODEL BYLAWS

________________________ ALUMNI CHAPTER
WILLIAM AND MARY ALUMNI ASSOCIATION

ARTICLE I – NAME
The name of this organization shall be the _______________ alumni chapter of the William and Mary Alumni Association of the College of William and Mary in Virginia. The chapter shall include alumni in the _______________ area. (area to be defined in conjunction with Alumni Association staff)

ARTICLE II – PURPOSE
The purpose of the chapter is to maintain and strengthen the bonds that exist between the alumni and the College and one another, to promote the welfare of College, the William and Mary Alumni Association, and the College community.

ARTICLE III – MEMBERSHIP AND DUES
Section 1. All persons who shall have been matriculated students at the College of William and Mary in Virginia, other than regular summer session students, and who have been enrolled in the College for as much as one regular college semester, or who have earned degrees from the College, are considered alumni and are eligible for membership in this chapter upon the payment of annual dues (if chapter charges dues).
Section 2. Chapters with more than 999 alumni in their defined chapter area are required to collect dues. The chapter’s board of directors shall establish the annual dues for members. Payment of annual dues shall be a prerequisite to membership in good standing and voting.
Section 3. If there are fewer than 999 alumni in the defined chapter area, and the chapter board of directors determines that dues payments are not necessary, all alumni (as defined in Article 1) are considered members of the chapter in good standing, and are eligible to vote.

ARTICLE IV – OFFICERS
The officers of the chapter shall consist of a president, vice president, secretary and treasurer. No officer shall serve more than one two-year term in a particular office. Officers must be members of the chapter in good standing.

ARTICLE V – DUTIES OF THE OFFICERS
Section 1. President – the president is the official representative of the chapter on all occasions, except when otherwise designated. The president shall preside at all meetings of the chapter, and have general supervision of all the day-to-day business of the chapter. The president is the primary contact with the Alumni Association staff liaison. The president shall be chairperson of an executive committee, and an ex-officio member of all other committees. The president shall designate the time for the next meeting at each board meeting, and assure that at least quarterly board meetings are held. The president represents the alumni chapter by participating in the William and Mary Alumni Association’s Chapter Presidents Council (CPC), and attending CPC meetings and participating in CPC-related activities as required. He/she is a co-signer on the chapter’s checking account.
Section 2. Vice President: the vice president assists the president as necessary, and in the absence or disability of the president, or at the president’s request, shall perform the duties of the president. If the office of the president becomes vacant, the vice president shall become president for the unexpired term. He/she shall perform such additional duties as may be delegated to him/her by the president.
Section 3. Secretary: the secretary shall record the minutes of the meetings and submit copies to the assigned Alumni Association staff liaison. The secretary shall conduct the correspondence of the chapter, and shall notify the Alumni Association staff liaison of all new officers immediately after election. The secretary shall keep a list of the membership of the chapter, and shall ensure that the list not be released for commercial or political purposes.

Section 4. Treasurer: the treasurer shall supervise all receipts and expenditures, and deposit all monies in a bank account approved by the board of directors. The treasurer shall collect and disburse dues subject to the approval of the board of directors, and submit a report at every business meeting. The treasurer shall serve as one of two signers on the chapter bank account, and shall be charged with the responsibility of all financial reporting as required by the Alumni Association. A list of names and class years of all those who paid dues must be sent to your WMAA staff liaison in a timely manner.

ARTICLE VI – BOARD OF DIRECTORS

Section 1. The chapter board of directors manages the business of the chapter. The primary functions of the chapter board of directors include policy making, resource management and event planning for the chapter. The board, which shall not exceed twelve members, shall consist of:

a. The elected officers of the chapter
b. Members reflecting the composition of the chapter’s membership
c. A representative of both the Young Guarde and the Olde Guarde
d. The William and Mary Alumni Association’s designated staff liaison as a permanent ex-officio member

Section 2. The chapter board of directors shall have the power to fill all vacancies.

Section 3. The government of the chapter and the direction of its activities shall be vested in the board of directors, subject to approval by the William and Mary Alumni Association.

Section 4. A meeting of the chapter board of directors must be called by the president upon written request of at least three members of the board.

Section 5. The chapter board of directors shall hold at least four meetings annually, and others as required.

Section 6. The members of the chapter board of directors shall serve terms lasting a period of three years. Each may be re-elected for a second consecutive three-year term.

ARTICLE VII – MEETINGS

Section 1. A general membership meeting shall be held annually, in order to conduct elections and business of the chapter. At least 14 days in advance, all members shall be notified of the time and place of the impending meeting.

Section 2. The president as deemed necessary may convene additional meetings.

Section 3. Any meeting of the chapter, or chapter board of directors, in which business is to be conducted requires a majority of directors to be present.

Section 4. There shall be no quorum requirements for general membership meetings or for committee meetings.

ARTICLE VIII – COMMITTEES

Section 1. Committee chairpersons shall be appointed from the membership by the president with the approval of the chapter board of directors. The chairperson from the chapter board of directors and the general membership shall select committee members. The following standing committees shall exist as part of the chapter:
a. Nominating committee consisting of at least three board members who are not eligible for re-election. The committee shall submit nominations for all officers and members of the chapter board of directors.
b. Executive committee consisting of the officers of the chapter.
c. Membership committee to develop membership recruitment plans and methods for obtaining and maintaining active members from all areas of the eligible population.
d. Publicity committee to plan and execute an effective publicity program, incorporating print and electronic communication resources, to ensure that the membership is kept abreast of activities and items of interest.

Section 2. The president of the chapter, with the approval of the chapter board of directors, shall appoint additional committees as necessary.

ARTICLE IX – ELECTIONS
Chapter board member elections take place at the chapter’s annual meeting. The nominating committee shall present nominations to fill impending board vacancies, vacancies occurring as a result of resignation, or removal with unexpired terms, and all officers of the chapter. The election will take place following a call for nominations from the floor. Voting privileges shall be granted to all members in good standing who are in attendance. Members of the board of directors and officers shall hold office until their successors have been elected and qualified. Terms for the board of directors shall be staggered. Officer terms are defined in conjunction with the Alumni Association’s fiscal year, from July 1 – June 30th.

ARTICLE X – REMOVAL FROM OFFICE
Officers and directors may be removed from office by a two-thirds vote of the board of directors.

ARTICLE XI – GUESTS
Members of the chapter may invite guests to any function of the chapter by paying the amount established for guests for that function.

ARTICLE XII – ANNUAL REPORT
The chapter shall file an annual report with the board of directors of the William and Mary Alumni Association, as well as Statement of Account reports as required by the Alumni Association’s Standards of Excellence.

ARTICLE XIII – ADOPTION
These bylaws shall be adopted officially upon approval of a two-thirds vote of the members of the chapter board of directors. They may be amended by a two-thirds voting majority at any duly called meeting of the chapter board of directors.

ARTICLE XIV – REVOCATION OF CHARTER
In the event that a chapter fails to maintain the standards set by the William and Mary Alumni Association, the Alumni Association reserves the right to revoke the alumni chapter charter.

Adopted: _________ by the ____________ Alumni Chapter Board of Directors
BYLAWS OF THE
CHAPTER PRESIDENTS COUNCIL
OF THE William and Mary Alumni Association
(As amended 9/10/01)

ARTICLE I: NAME
The name of the organization shall be the Chapter Presidents Council of the William and Mary Alumni Association of the College of William and Mary in Virginia.

ARTICLE II: PURPOSE
The purpose of the Chapter Presidents Council shall be to 1) Recognize the critical role of alumni chapters in keeping alumni connected to and informed about the College; 2) provide a direct forum for discussion and interaction between alumni chapter presidents around the country; 3) establish a channel for communication between alumni living at a distance from the College and the William and Mary Alumni Association, William and Mary administrative and academic staff and students; 4) encourage the exchange of creative ideas and suggestions for successful chapter programs and 5) help to determine the future directions of the Association’s chapter policies and structures.

ARTICLE III: MEMBERSHIP
A member of the Chapter Presidents Council is defined as an alumnus who is currently serving in the capacity of the president of an officially recognized alumni chapter of the William and Mary Alumni Association. Membership in the Council begins upon election to office and extends for the full duration of their term as president of their local alumni chapter.

Honorary membership shall be extended to those who are approved by name by a majority of the Council.

ARTICLE IV: MEETINGS
The Council shall hold a minimum of one annual meeting each year, to be held during Charter Day weekend. Other meetings of the officers or the general Council membership may be called as deemed necessary by the officers and William and Mary Alumni Association liaison. Should a chapter president be unable to attend, he or she may designate another member of the chapter to serve as the chapter representative. Such designee, however, will not be granted voting privileges during the meeting. Additional communications vehicles such as the Internet and conference calls can also be used to conduct business of the Council between meetings.

ARTICLE V: OFFICERS
The officers shall consist of a chair and a vice chair, who shall be elected on an annual basis by a majority vote of the Council from among its members in attendance at the annual meeting of the Council. The chair and vice chair shall take office as of July 1 of the same year to align their term of service with the William and Mary Alumni Association’s fiscal year. Term of office will be one year, with each officer eligible to fill a maximum of two consecutive terms of office in each elected position. The chair or vice chair must have been serving as a president of their local chapter when initially elected. They may serve as chair or vice chair after relinquishing their
duties as local chapter president for a period not to exceed two years. The outgoing chair will be eligible to serve on the Council as an ex-officio non-voting member for up to two years following the completion of their term. Chapter Presidents Council members may be elected to serve as Council chair or vice chair again after two years have passed since they last held office.

**ARTICLE VI: DUTIES OF THE OFFICERS**

The duties of the officers are as follows:

Chair: the chair shall preside at all meetings of the Council. The chair will have the power to call meetings of the Council, will act as the primary liaison between the council and the William and Mary Alumni Association staff and will represent the Council at college functions and meetings as deemed appropriate.

Vice Chair: the vice chair shall preside at meetings of the Council in the absence of the chair and shall perform the duties of the chair at the chair’s request. Should the office of the chair become vacant, the vice chair shall fill the position of the chair for the remainder of the un-expired term.

**ARTICLE VII: COMMITTEES**

Should committees be determined to be necessary by the Council, committee chairs will be appointed by the Council chair upon the approval of the Council members. Committee chairs shall be selected from among the Council membership. Committee members should also be selected primarily from among the Council membership, although occasions may arise where individuals from the alumni population at large may effectively and appropriately serve on such a committee.

**ARTICLE VIII: PRIVACY POLICY**

The Chapter Presidents Council shall comply with the privacy policy of the William and Mary Alumni Association to insure the confidentiality and proper use of alumni records and databases.

**ARTICLE IX: AMENDMENTS**

These bylaws shall be officially adopted upon approval of a two-thirds majority of Council members in attendance at the annual meeting pending final approval and acceptance by the William and Mary Alumni Association. It may be amended by a two-thirds vote at any duly called meeting of the Council only after thorough review of the proposed amendments by the Council members. Proposed amendments shall be drafted and provided to all Council members prior to the meeting at which such proposed amendments are discussed. No amendments or revisions of the bylaws shall take effect until review and approval by the Board of Directors of the William and Mary Alumni Association.
Appendix 6

**EVENT ORGANIZER’S CHECKLIST**

Type of Event: _________________
Date of Event: _________________

- During your chapter’s annual planning session:
  - Hold an initial meeting with the chapter board to discuss event
  - Formalize a steering committee for this event
  - Steering committee chair to organize subcommittees (telephone committee, publicity committee)
  - Set date for event. Consider selecting an alternative date in case your first-choice venue is not available or need to reschedule due to inclement weather

- At least three months before the event
  - Committee members should begin working on assigned tasks (catering, venue, speaker and marketing plan)

- At least 10 weeks before the event
  - Hold a second meeting of the event planning committee so the members can report on their progress, and final decisions can be made

- Six weeks out
  - Chapter mailing will be sent from the Alumni Association
  - Telephone subcommittee begins to call alumni in chapter area
  - Publicity subcommittee begins campaign to promote event including working with WMAA liaison to begin mailing process, creation of mass email and updating of chapter Web site

  Please note: these are very important deadlines! Third class mail can take up to three weeks for delivery. Also, do allow alumni time to RSVP

- Four weeks out
  - The event committee comes back together to finalize any last minute details
  - Responses begin to come in
  - Make arrangements for any audiovisual needs (podium/microphone, LCD projector, etc.), room set-up and program for the event

- One week out
  - Confirm numbers of those attending with facility and any other vendors being used

- The BIG EVENT is here!!! Enjoy the fruits of your labor

- After the event, complete the Event Evaluation form in the Appendices and return it to the Alumni Programs office. This allows for historical documentation for the chapter as well as assistance in planning when shared with other chapters.
**SUGGESTED CHAPTER CALENDAR**

July
- Hold first of four board meetings as required by bylaws
- Submit Statement of Account
- Solicit chapter/club dues for next fiscal year
- Update chapter list with Alumni Records

August
- Submit Annual Chapter Evaluation by August 1
- Prepare Fall/Dues Newsletters
- Have a recruitment event for new alumni in your area*
- Send list of dues payers (ongoing)

September
- Attend Chapter President’s Council meeting
- Attend Alumni Leadership Assembly (biennially)
- Host a Tribe watch/tailgate event*

October
- Hold second of four board meetings as required by bylaws
- Send treasurer’s report
- Participate in Make a Difference Day
- Attend Homecoming

November
- Host a Tribe watch/tailgate event*

December
- Host a holiday event/party*

January
- Prepare Spring Newsletter
- Hold third of four board meetings as required by bylaws
- Submit Statement of Account (for July – December)

February
- Attend Chapter President’s Council meeting
- Host a Charter Day event*

March
- Attend New York Auction (biennially)
- Host a “behind the scenes” event*

April
- Hold fourth of four board meetings as required by bylaws
- Send treasurer’s report
- Host an admitted student event*
- Submit Alumni Chapter Book Scholarship Application form & donation by April 15.
May

- Open nominations for board elections as required by bylaws
- Schedule a chapter planning retreat
- Schedule a happy hour/first table event*
- Host a spring/summer family-style picnic*

June

- Hold the annual general meeting and elections
- Conduct training & transition for the board
- Submit Statement of Account (for July – June) by July 15
- Submit goals and calendar of activities for fiscal year by July 15
- Submit board members/chapter officer update by July 15

Miscellaneous

- Submit event evaluation form and attendance list to your assigned staff liaison after each event.
- Submit chapter meeting minutes to your assigned staff liaison after each meeting.

*These events are suggested chapter programs.
IMPORTANT COLLEGE TELEPHONE NUMBERS

General Switchboard 757.221.4000

William and Mary Alumni Association 757.221.1842
  Business and Budget Management 757.221.1201
  Communications 757.221.1164
  EVP Office 757.221.7855
  Gift Shop 757.221.1907
  House Rentals 757.221.1176
  Products and Services 757.221.1168
  Programs and Special Events 757.221.1174
  Records and Information Systems 757.221.1178
  Travel Program 757.221.1165

Academic Offices
  Arts and Sciences, Undergraduate 757.221.2465
  Arts and Sciences, Graduate 757.221.2467
  Mason School of Business, Undergraduate 757.221.4100
  Mason School of Business, Graduate 757.221.2893
  School of Education, Undergraduate 757.221.4300
  School of Education, Graduate 757.221.2317
  Marshall-Wythe School of Law 757.221.3800
  Virginia Institute of Marine Science/School of Marine Science 804.684.7000

Athletics 757.221.3400

Admissions (Undergraduate) 757.221.4223

Career Center 757.221.3240

Development/The Fund for William and Mary 757.221.1006

Muscarelle Museum 757.221.2700

Police Department (non-emergency) 757.221.4596

President’s Office 757.221.1693

Swem Library 757.221.INFO

Ticket Offices
  Athletics 757.221.3340
  Phi Beta Kappa Hall 757.221.2674
  Virginia Shakespeare Festival 757.221.2674
  William & Mary Concert Series 757.221.3276
  William & Mary Hall 757.221.3340
# Important College and Association Dates

## Fall 2006

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
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<tbody>
<tr>
<td>New Student Orientation</td>
<td>August 25-29</td>
</tr>
<tr>
<td>Classes begin</td>
<td>August 30</td>
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<tr>
<td>Opening Convocation</td>
<td>September 1</td>
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<tr>
<td>BOV Meeting</td>
<td>September 14-15</td>
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<tr>
<td>WMAA Fall Awards</td>
<td>September 21</td>
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<tr>
<td>WMAA Board Meetings</td>
<td>September 21-22</td>
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<tr>
<td>WMAA Alumni Leadership Assembly</td>
<td>September 22-23</td>
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<tr>
<td>Family Weekend</td>
<td>September 29-October 1</td>
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<tr>
<td>Fall Break</td>
<td>October 14-17</td>
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<tr>
<td>Classes Resume</td>
<td>October 18</td>
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<tr>
<td>Make a Difference Day</td>
<td>October 21</td>
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<tr>
<td>Homecoming</td>
<td>October 26-29</td>
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<tr>
<td>Begin Thanksgiving Break</td>
<td>November 16-17</td>
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<tr>
<td>Classes Resume</td>
<td>November 22</td>
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<tr>
<td>Last Day of Fall classes</td>
<td>November 27</td>
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<tr>
<td>Reading Periods</td>
<td>December 8</td>
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<tr>
<td>Exams</td>
<td>Dec. 9-10, 13, 16-17</td>
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<tr>
<td>WMAA Santa Brunch</td>
<td>December 16</td>
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<tr>
<td>College’s Yule Log Ceremony</td>
<td>December 16</td>
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<tr>
<td>December Degrees Conferred</td>
<td>December 23</td>
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<tr>
<td>Yulelog Ceremony</td>
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## Spring 2007

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
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<tbody>
<tr>
<td>New Student Orientation</td>
<td>January 20-23</td>
</tr>
<tr>
<td>MLK Holiday (No classes, Offices closed)</td>
<td>January 15</td>
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<tr>
<td>WMAA &amp; The Fund Reunion Workshop</td>
<td>January 20</td>
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<tr>
<td>Classes begin</td>
<td>January 24</td>
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<tr>
<td>WMAA Alumni Medallion Ceremony</td>
<td>February 9</td>
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<tr>
<td>Charter Day</td>
<td>February 10</td>
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<tr>
<td>Spring Break begins</td>
<td>March 10</td>
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<tr>
<td>WMAA Board Meetings</td>
<td>March 15-16</td>
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<tr>
<td>Classes resume</td>
<td>March 19</td>
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<tr>
<td>WMAA Old Guarde Day</td>
<td>April 30</td>
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<tr>
<td>Last day of Spring classes</td>
<td>May 4</td>
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<tr>
<td>Reading Periods</td>
<td>May 5-6, 12-13</td>
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<tr>
<td>Exams</td>
<td>May 7-11, 14-16</td>
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<tr>
<td>WMAA Alumni Induction/Honorary Alumni</td>
<td>May 18</td>
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<tr>
<td>Commencement</td>
<td>May 20</td>
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<tr>
<td>Memorial Day (No classes, Offices closed)</td>
<td>May 29</td>
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<tr>
<td>Summer Session 1 Classes begin</td>
<td>May 30</td>
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<tr>
<td>Last day of Summer Session 1 classes</td>
<td>June 30</td>
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<tr>
<td>Summer Session 2 Classes begin</td>
<td>July 3</td>
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<tr>
<td>Last day of Summer Session 2 classes</td>
<td>August 4</td>
</tr>
<tr>
<td>August Degree Conferred</td>
<td>August 9</td>
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</tbody>
</table>