

# LAFAYETTE

HANDBOOK FOR ALUMNI CHAPTER LEADERS



# Handbook for Alumni Chapter Leaders

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Lafayette College  
Office of Alumni Affairs

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The Office of Alumni Affairs thanks the following members of  
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A special thanks to Lydia Spano and Dave Block '93  
for their assistance in preparing this document.

## Front Cover

Lafayette College honored the memory of Daniel Patrick O'Neil '06 by dedicating the newly renovated plaza in front of Colton Chapel in his name. O'Neil, who graduated May 2006 with a B.S. in civil engineering, lost his life in the shootings at Virginia Tech April 16, 2007.

Renovations to the plaza, which is home to the Daniel Chester French statue of the Marquis de Lafayette, were completed just in time for the 250th anniversary of the Marquis' birth Sept. 6.

The bronze statue was fully refurbished and a new fountain, a flagstone patio, attractive wooden benches, and landscaping were added. The project was made possible by generous support of Jere G. Oren '50 in memory of his parents, Samuel and Sophie.



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Dear Alumni Chapter Leader:

On behalf of Lafayette's Office of Alumni Affairs and the Alumni Association, I would like to thank you for taking on the extraordinary and fulfilling role of leader in our chapter program. You are part of a large and dedicated group of volunteers who are committed to keeping Lafayette alumni connected to the College and each other.

Our focus is to build, re-invigorate, and sustain chapters around the world. However, with over 28,000 alumni worldwide, this is a daunting task. We can't do it alone. We need your help. Your involvement and strong leadership within your chapter are vital to our efforts to enhance, strengthen, and promote alumni connections. For many of our alumni, the chapter network is the only connection they have with Lafayette.

This handbook was a collaborative effort between our chapter team within the Office of Alumni Affairs and the Alumni Association's Chapters Committee. The purpose is to provide the essential information you need to organize, guide, lead, and sustain an effective chapter through a variety of activities each year. The strength of each Lafayette chapter depends on the strength of its leadership. And we're here to help. Working together we can strengthen the bond our alumni have with Lafayette College. We hope you find within these pages suggestions that will help you make your chapter a sustainable success.

As you carry out your activities, you will be supported by the professional staff within the Office of Alumni Affairs. They can be reached at (610) 330-5583, 1-800-LAFAYETTE (outside Pa.), [alumni@lafayette.edu](mailto:alumni@lafayette.edu) or through the alumni home page at [www.lafayette.edu](http://www.lafayette.edu) (select "Alumni," "Meet the Alumni Office Staff").

Your enthusiasm for and dedication to Lafayette are invaluable. Thank you for the important work you are doing to advance your alma mater. Our team looks forward to working with you.

Warmest regards,

A handwritten signature in black ink, appearing to read "Sherri Jones". The signature is fluid and cursive, with a long horizontal flourish extending to the right.

Sherri Jones, Director

# Chapter One: Mission Statement

## MISSION STATEMENT

The mission of a Lafayette alumni chapter is to engage all alumni living or working within its area so that they will be eager to maintain an ongoing connection to Lafayette College and to other alumni, parents, students, and friends of the College. The alumni chapter provides opportunities for the College to communicate its achievements, service, and future direction to its members so that they can:

- Further the values, interests, and programs of the College, its alumni, and the Alumni Association;
- Build a network of informed alumni, students, and parents who are connected to each other;
- Foster an intellectual connection to the College through increased interaction with Lafayette faculty;
- Create alumni and parent advocates for Lafayette by connecting them to the student body;
- Foster a continuing relationship with students so that some day they will play an active role as alumni;
- Instill a sense of community in all alumni, students, parents, and friends to further promote the bonds shared by all;
- Provide career-related guidance and networking support for young alumni upon graduation from the College;
- Serve the local community;
- Support the College financially; and,
- Influence outstanding high school students to select Lafayette, facilitating new student recruitment efforts so that the College will continue to grow and remain strong.

# Chapter Two: Chapter Organization

## CHAPTER CRITERIA

Alumni chapters are organized in specific geographic regions of the United States and abroad. Alumni wishing to establish a chapter in their area should contact the Office of Alumni Affairs for information, [alumni@lafayette.edu](mailto:alumni@lafayette.edu), (610) 330-5040 (in Pennsylvania), 1-800-LAFAYETTE (outside Pennsylvania).

For a complete listing of home pages for established alumni chapters, consult the alumni web page at [www.lafayette.edu](http://www.lafayette.edu). Each chapter home page lists the current officers, upcoming events, and chapter news.

## GETTING STARTED

To form a new chapter or revitalize a dormant chapter, the following steps should be taken:

1. Contact your alumni affairs liaison. His or her contact information should be listed on your chapter's home page or, if this is a new chapter, you may get that information by contacting the Office of Alumni Affairs, (610) 330-5583. The alumni affairs liaison will work with you to get the process started. Visit [www.lafayette.edu](http://www.lafayette.edu); select "Alumni" then "Meet the Office of Alumni Affairs Staff." If you are viewing this manual electronically, click here: [http://www.lafayetteexperience.com/alumni/office\\_new.php](http://www.lafayetteexperience.com/alumni/office_new.php)
2. The Office of Alumni Affairs will identify alumni in your chapter area and share a roster with those interested in organizing or re-establishing an alumni chapter.
3. An electronic survey can be sent to alumni, parents, and friends of the College to determine the level of interest in establishing or revitalizing the chapter and to identify those willing to participate.
4. The chapter's alumni affairs liaison will assist in hosting the first chapter event. The staff liaison will attend this initial meeting to share programming ideas and to help recruit an executive committee.
5. Once the executive committee has been recruited, a meeting should be held to begin the event-planning process. The alumni affairs liaison will work with members to schedule an initial meeting for the executive committee to devise a chapter plan and determine the appropriate chapter kickoff event. At this meeting, officers should be elected to coordinate the work of the executive committee.
6. The executive committee will work with the alumni affairs liaison to host successful chapter events.
7. Eventually, the chapter will want to request dues from its constituents for seed money to subsidize or pay deposits for events.

### *Chapter leaders should:*

- Adopt bylaws. This document should be on file with your alumni affairs liaison in the Office of Alumni Affairs. See Appendix V for a model Chapter Bylaws.
- Provide your alumni affairs liaison with events dates and details no later than Nov. 1 for events in the first half of the next year (January through June) and March 1 for events in the second half of the year (July through Dec.).
- Host at least one of the following events annually (other than the telecast party and the welcoming event for new students):
  - Educational
  - Social/Cultural
  - Community Service

## Chapter Two: Chapter Organization

### *Chapter leaders can expect:*

- The Office of Alumni Affairs will provide support (e.g., invitations, coordination) for up to five chapter events each year. Beyond this, the alumni affairs liaison will continue to support events by posting event listings on the online Alumni Calendar of Events and the chapter home page, should the chapter not have a web administrator to do so.
- For chapter events such as annual dinners and other formal activities, the alumni affairs liaison will work with the alumni communications editor and the Office of Public Information to create invitations and coordinate mailings, and the Office of Alumni Affairs will cover postage.
- For other chapter activities such as pub nights and most athletic events (including the Lafayette-Lehigh telecast parties), your alumni affairs liaison will assist chapter leaders with sending invitations electronically through the Alumni Online Community.
- Support for the design, printing, and mailing or emailing of invitations and electronic newsletters. Communications may be coordinated by the Office of Alumni affairs liaison and the alumni communications editor. Chapter officers also will be given administrative access to the Alumni Online Community so that they may send out email messages to chapter alumni. Email is the preferred method of communication.
- Calendar listings on the online Alumni Calendar of Events and access to a chapter home page for posting the names of chapter officers, chapter news, and events.
- Suggestions for faculty, administrators, or coaches to serve as featured speakers for chapter events. The alumni affairs liaison will make all the arrangements and the Office of Alumni Affairs will cover the speaker's costs of transportation, meals, and overnight accommodations, when necessary.
- Your alumni affairs liaison will attend at least one chapter event per year and will visit with chapter leadership.
- The Office of Alumni Affairs will provide Lafayette name badges and, if requested, assistance with taking reservations and collecting fees for chapter events. Registration for chapter events is available as a feature of the Alumni Online Community. Ask your alumni affairs liaison for assistance with online registration.
- Lafayette alumni banners are available to borrow for chapter events.

## ALUMNI AFFAIRS LIAISONS

The Office of Alumni Affairs assigns one of three liaisons to support each chapter. These staff members handle areas such as helping establish or revitalize chapters, assisting with event planning, coordinating printed invitations with the alumni communications editor in the Office of Public Information and electronic ones through the Alumni Online Community, and, when necessary and requested, taking guest reservations, preparing name badges, collecting event fees, and making payments to venues.

## NCAA REGULATIONS

Athletic recruiting by alumni is strictly prohibited. "Play by the rules" is the motto of the NCAA, which has specific prohibitions relating to alumni activity and student-athletes. In short, alumni should avoid contact with prospective student-athletes who are being recruited to play at the college level. If the chapter invites a student-athlete and/or family members to an event, the athlete and family members must pay the full ticket price, even when the athlete will be a speaker at the event. Also, he or she cannot accept an honorarium. Questions as to whether NCAA rules and regulations may affect an event or activity should be directed to your alumni affairs liaison.

## Chapter Two: Chapter Organization

For details regarding alumni/booster guidelines, visit [www.lafayette.edu](http://www.lafayette.edu); select “Athletics,” then “Maroon Club” and “NCAA Regulations.”

If you are viewing this manual electronically, click here:

<http://goleopards.cstv.com/maroonclub/maroonclub-ncaareg.html>.

### MODEL EXECUTIVE COMMITTEE

The following are job descriptions for a *model* executive committee, including officers. It may not be necessary for chapters to fill all the positions.

#### *President*

- Represents the chapter as the official spokesperson.
- Serves as an ex-officio member of all chapter committees.
- Presides at all area chapter and officer meetings.
- Assumes responsibility for the scheduling success (and follow-up) of each activity or project the chapter undertakes.
- Approves agenda for each meeting.
- Should be visible at chapter functions or appoint an executive committee member to attend.
- Works to increase membership and participation.
- Serves as the liaison to the Office of Alumni Affairs and the Alumni Chapters Committee.

#### *Vice President/President-Elect*

- Performs the duties of the president in his/her absence.
- Handles arrangements for executive committee meetings.
- Co-leads meetings with the president.
- Assists all officers at functions in order to become familiar with and promote chapter operations.
- Ready to assume the presidential duties when deemed necessary with all the rights, privileges, and powers as if he/she had been the duly elected president.

#### *Secretary*

- Maintains the chapter’s records.
- Responsible for gathering minutes and recording pertinent information from executive committee meetings.
- Maintains samples of all mailings to chapter members.
- Forwards complete minutes of all meetings to the alumni affairs liaison.
- Works with the rest of the chapter’s executive committee to schedule and submit event dates and details no later than Nov. 1 for events in the first half of the next year (Jan. through June) and March 1 for events in the second half of the year (July through Dec.) in order to ensure the appropriate promotion and Office of Alumni Affairs support. Details should follow at least three months prior to each event.
- May serve as chapter web page administrator—keeping page updated—if the chapter does not have someone filling that role.



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### *Chapter Home Page Administrator*

- Maintains official chapter home page on the College's web site and is responsible for posting all chapter events and news as well as keeping the leadership roster current.
- Establishes and maintains other Internet pages such as Facebook for membership.

### *Treasurer*

- Maintains financial records for the chapter.
- Provides the alumni affairs liaison with an annual report of financial matters.
- Coordinates the collection of chapter dues, if applicable.
- Coordinates the distribution of chapter membership cards, if applicable.

### *Young Alumni Activities Coordinator*

- Develops and chairs events specifically targeting alumni who graduated within the past 15 years.
- Should be visible at young alumni chapter functions or appoint an executive committee member to attend.

### *Alumni Admissions Representative*

- Assists in organizing any event that would involve prospective Lafayette students.
- Assists in organizing the welcoming event for new students and parents each summer. This is not to be confused with the event for accepted students held earlier in the spring and sponsored by the admissions office.

### *Career Services Representative*

- Assists in recruiting alumni extern and intern hosts.
- Assists with or coordinates professional networking events sponsored by the chapter.

### *Committee Members*

- Attend committee meetings.
- Offer ideas for chapter events and activities. May serve as chair of an event.
- Call or email a group of 10-12 chapter members prior to each event to extend a personal invitation and encourage members to attend.
- Attend chapter events.
- Agree to have their contact information posted on the chapter home page.

### *Recruiting, Training, and Promoting Chapter Leaders*

Besides structure, leadership also is essential to the viability of the chapter. Chapter leaders must have a plan for the continuation of leadership and constantly be on the lookout for members to fill leadership positions. Some ideas for leadership succession include:

- Change officers on a regular basis; a term of office should be two or three years.
- Stagger terms so that the chapter can hold elections annually to prevent a complete turnover

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of officers and newly appointed executive committee members.

- If asked, the alumni affairs liaison will assist in recruiting new chapter leaders; however, current officers usually can identify the best candidates.
- Consider alumni admissions representatives (AARs), Maroon Club members, and members of other affinity groups when recruiting new chapter leaders as they have had a special connection with the College and are knowledgeable about current College programs.

The Chapters Committee of the Alumni Council has established a mentoring program for new chapter leaders. The chair of the Chapters Committee will match experienced leaders with new ones for a minimum of one year. During this time, the mentors will assist the new leaders with organizational plans and ideas for events, and provide support.

### CHAPTER AWARDS

Awards are presented to deserving chapters at the alumni volunteer recognition event held annually. The Office of Alumni Affairs and Alumni Council Chapters Committee members review chapter activities and nominate chapters and their volunteers. Details can be found on the alumni web site by visiting [www.lafayette.edu](http://www.lafayette.edu); select “Alumni,” then “Volunteer Awards.”

If you are viewing this document online, click here:

[http://www.lafayetteexperience.com/alumni/volunteer/awards/index\\_new.html](http://www.lafayetteexperience.com/alumni/volunteer/awards/index_new.html)

The following are brief descriptions of each award:

- **William E. Greenip Jr. Class of 1944 Award.** This award is presented to one active alumni chapter officer based on voluntary service achievements “over and above” his or her faithful carrying out of regular officer assignments. It honors the memory of William E. Greenip ’44, former alumni secretary.
- **Chapter Support Person of the Year.** This award is presented to the individual who continually strives to promote alumni activity and interaction within his or her respective chapter.
- **Chapter of the Year.** This award is presented to the chapter that successfully hosted a diverse array of events while cultivating the chapter’s leadership and promoting area alumni participation.
- **Chapter or Class Web Administrator Award.** This award recognizes an effective web administrator for class or chapter home page management and effectiveness.
- **Chapter Event Chairperson of the Year.** This award is presented to the individual who exudes leadership in the planning and execution of chapter events. He or she echoes a chapter’s commitment to promote a diverse array of events for the alumni, parents, and friends of Lafayette College.

# Chapter Three: Finance

## DUES STRUCTURE

It is strongly recommended that chapters collect dues as a means of subsidizing chapter events or providing deposits for them. The amount chapters charge for dues ranges from \$15 to \$35. Some offer discounts to young alumni and dues-paying members for attendance at chapter events. It is best to send out the annual dues request in January with a brief outline of the chapter's activities over the past year and tentative plans for the next 12 months.

The chapter president or treasurer usually solicits members for dues annually, either in connection with an invitation to an event or in a separate letter. While the Office of Alumni Affairs does keep general information regarding the various rates for chapters, it does not keep records of who has paid chapter dues. The treasurer keeps records of dues received and credited.

The following guidelines are recommended:

- Be clear and specific about the use of dues on the solicitation form.
- Provide a pre-addressed envelope (usually with the treasurer's address on it). Include a personal note on the solicitation for better results.
- State on the dues form that the check must be made out to the chapter unless the chapter's treasury is being held by the College, in which case the check should be made out to Lafayette College.
- Some form of recognition should be made for each dues-paying member, e.g., a receipt and thank you note, a membership card or the offer of a discounted fee at a future event. Dues do not constitute a tax-deductible donation.

Generally, 20 percent of a chapter is comprised of dues-paying members. Second to the written solicitation, the most successful recruiting tool is using a phone or email tree format. Usually personal requests will yield 25 percent of the alumni contacted to become dues-paying members.

## CHAPTER REVENUE AND EXPENSES

The chapter treasurer maintains the treasury for the duration of his or her term. The treasurer sets the guidelines for the management of chapter funds and ensures that these guidelines are ratified by the chapter officers.

A chapter may have the College hold its treasury in account. Alternatively, chapters may choose to establish checking accounts for this purpose. For details and a discussion of the benefits of either system, contact your alumni affairs liaison.

It is strongly recommended that the chapter's financial records be maintained on a computer accounting or spreadsheet system. Financial records of the chapter must be maintained in accordance with standard accounting practices. The treasurer is authorized under the bylaws to receive and disburse funds. Other officers may also authorize the disbursement of funds.

Chapter funds are to be used solely to benefit the chapter. The treasury is maintained for the expenses of chapter events, including deposits, subsidies, and discounting event fees for young alumni.

All invoices should be in the name of the chapter and payable only after approval is indicated on the invoice by the authorizing officer. The treasurer should also make clear to all officers the amount of discretionary money that is available to them to spend on a particular project.

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### TAX-EXEMPT STATUS

The College has established tax-exempt status in certain states; however, this exemption does not extend to alumni chapters. As a result, the College may act as the formal sponsor for some events if a reduced fee (e.g., no sales tax) is available for tax-exempt organizations. Please work with the event site and the alumni affairs liaison to determine the most suitable sponsor for each event.

### CHECK REQUESTS AND REIMBURSEMENTS

Original receipts must be submitted with all requests for reimbursement. The person or chapter requesting a reimbursement should attach an explanation of how and when the expense was incurred on chapter business.

There may be circumstances when an individual wishes to make a gift to the College related to a chapter event. The donor must verify that no goods or services were provided in consideration of this donation. To be qualified by the Division of Development and College Relations, the donor must submit original receipts and an explanation to their alumni affairs liaison. If the gift meets the qualifications, the College will send the donor an acknowledgement that complies with IRS regulations.

### CONTRACTS

When contracts are required, the document is subject to review by the Office of Alumni Affairs. To avoid personal liability, chapter leaders should have all contracts issued to Lafayette College and signed by their alumni affairs liaison; otherwise, insurance and liability concerns are the responsibility of the chapter leader signing the contract.

Chapter leaders should make every attempt to obtain a competitive price for services and merchandise when working with new and established vendors alike. Pre-approval must be secured before any negotiations are entered.

For all contracts signed by the alumni affairs liaison, a W-9 Form is required from the vendor and must be on file in the Controller's Office. See Appendix X for directions and the W-9 Form.

### FUND-RAISING

All fund-raising activities must be coordinated through the Office of Alumni Affairs and the Division of Development and College Relations. Please contact your alumni affairs liaison, who will contact the appropriate person on the development staff and set up any necessary meetings. You also should involve your executive committee in any fund-raising activities. Please note that the distribution of an annual dues notice does not require a meeting or any pre-approval by the alumni affairs liaison or development staff.

### SCHOLARSHIPS

If your chapter wishes to fund a scholarship, please contact your alumni affairs liaison, who will connect you with the appropriate development staff member.

# Chapter Four: Communications

## PRINT COMMUNICATIONS

Because of the tremendous growth in the number of alumni chapters, it has become necessary for chapters to submit information about events **at least three months** before the actual dates. This advance notice is necessary because all invitations are produced by the public information office (PIO) in accordance with the high standards maintained by the College in its printed communications. The time needed for this process, and PIO's busy schedule of producing printed materials for the various sectors of the College, does not allow for sending out invitations on short notice. Reprographics, the on-campus printing vendor, also services the entire campus community, reinforcing the need for advance notice of printing requests.

## EMAIL COMMUNICATIONS

Until chapters are able to access blast email capabilities through the Lafayette Alumni Online Community, all email blasts will be prepared by the alumni affairs liaison and the office assistant. Each message takes time to prepare and get into the queue. A new list of alumni email addresses is generated for each email blast to ensure that the most updated addresses are used. Due to increased demand, all requests for email generations should be made through the alumni affairs liaison at least two to three weeks prior to the emailing date.

Confirm with your alumni affairs liaison when you would like to include neighboring chapters in event promotions. Some events may be appropriate for alumni beyond the immediate area covered by your chapter (e.g., Northern New Jersey and Connecticut might be invited to events hosted by the New York City chapter).

The Office of Alumni Affairs is moving toward a greater dependence on electronic communication and away from mailed invitations. This shift is necessitated by the growing number of active alumni chapters and the increased cost of staff time, printing costs, and postage. Your alumni affairs liaison will be your best source of information regarding this transition.

## OTHER ELECTRONIC COMMUNICATIONS

**Web Page Updates** – The chapter secretary or home page administrator has the responsibility for keeping the chapter's home page current with information on chapter officers, news of upcoming events, and reports on past events. Your alumni affairs liaison will secure access for the web page. No knowledge of HTML is necessary. To find your chapter home page, visit [www.lafayette.edu](http://www.lafayette.edu), select "Alumni" and "Chapter Home Pages." If you are viewing this manual electronically, click here: [http://www.lafayetteexperience.com/alumni/chapters/chapters\\_splash.php](http://www.lafayetteexperience.com/alumni/chapters/chapters_splash.php).

**Online Community** – All chapter officers and executive committee members should register with the Lafayette Alumni Online Community as soon as possible. Use your Lafayette forwarding email address in all chapter correspondence. As an alum, you are eligible to have a Lafayette forwarding address, post chapter events, photographs or class notes, upload your resume, and update your profile listing. As a chapter officer you will be given administrative access to send blast email messages through the Alumni Online Community. Contact your alumni affairs liaison for more information or visit [www.lafayette.edu](http://www.lafayette.edu), select "Alumni," and the Alumni Online Community icon. If you are viewing this document online, click here to register for the Alumni Online Community: <http://www.alumniconnections.com/olc/pub/LFT/homepage.cgi>.

## Chapter Four: Communications

*Photos* – We encourage chapters to have someone take digital photos at events and submit them to their alumni affairs liaison for possible use on the chapter web page and other College communications.

For more information, visit [http://www.lafayetteexperience.com/alumni/send\\_photos.pdf](http://www.lafayetteexperience.com/alumni/send_photos.pdf)

*Roster Requests* – Chapter leaders may request from their alumni affairs liaison a list of alumni, parents, and friends living in the chapter area. These lists are not to be considered valid for more than one month and should be kept confidential. The lists are for official chapter use and not for any private, commercial or political mailings. Unauthorized use may violate privacy rights and is strictly prohibited.

# Chapter Five: Chapter Events

Programs offered by a chapter depend in large part on the number of alumni within a reasonable proximity to chapter activities and whether the chapter is located in an urban, suburban or rural area. Smaller or less established chapters may successfully host 2-4 events a year. The larger, more established chapters may host as many as 12 events a year. For information about chapter events, see the most recent issue of the *Lafayette Alumni News*. Visit [www.lafayette.edu/magazine](http://www.lafayette.edu/magazine) and look for *Chapters Update* following the *Class Notes*.

## TYPES OF EVENTS

The most successful chapters have discovered the best type of calendar is one offering a variety of events. Some alumni want to participate in social events, others in educational programs, some prefer to participate in community service projects, and some want to participate in the entire spectrum.

The following are examples of the different types of chapter activities:

- Gatherings with faculty, administrators, or coaches as featured speakers
- Tailgates at Lafayette athletic events, on-campus or at an away game
- Theater or museum outings
- Holiday receptions
- Lafapalooza: Lafayette's National Days of Service in mid-April
- Events targeted to raise scholarships funds
- Welcoming events for new students
- Chapter "care packages" to students
- On-campus alumni visits to students
- Hosting visiting student groups (e.g. athletic teams, choirs) or sponsoring an event for them during summer and interim sessions
- Book clubs
- College nights and high school visits (alumni admissions representative activities)
- Recruiting extern or intern hosts
- Professional sporting events
- Lafayette-Lehigh telecast parties
- Football, soccer, crew, or basketball road trips
- Golf or tennis outings
- Boat cruises
- Family-oriented picnics
- Wine-tasting parties
- Cooking classes
- Young alumni events (networking and pub nights, etc.)
- Monthly luncheons (featuring alumni or faculty speakers )
- Welcoming parties for new alumni
- Networking events (could include professional and social components)

## Chapter Five: Chapter Events

All chapters will be considered for the Outstanding Chapter of the Year Award, presented annually by the Alumni Council and the Office of Alumni Affairs. The criteria differs depending on the size of the chapter, but the basic premise is to incorporate different types of activities to meet the needs and interests of all members: alumni, parents, students, and friends of the College.

To be as effective as possible in planning, the executive committee and event chairpersons should establish a calendar of events every six months to ensure sufficient planning time so that events are not concentrated in one period of the year. With a strong core group of volunteers, these events are fairly simple to plan and execute.

### ARRANGING FOR GUEST SPEAKERS

Members of the Lafayette faculty and staff (including coaches) are often willing to speak at chapter events, particularly when they travel to conferences in a chapter area. To arrange for a featured speaker at an event, contact your alumni affairs liaison. The Office of Alumni Affairs will cover travel expenses, meals, and overnight accommodations when necessary. Usually arrangements have to be made a semester in advance due to teaching, on-campus or coaching responsibilities.

### ANNUAL CHAPTER EVENTS

There are four events that most alumni chapters host on an annual basis: welcoming events for new students, Lafayette-Lehigh telecast parties, chapter dinners, and Lafapalooza: Lafayette's National Days of Service.

- The welcoming events are coordinated and may be partially sponsored by the Office of Alumni Affairs. These are most often held at alumni homes in late summer as send-offs for the new students just before they leave for campus. Larger chapters may wish to host their welcoming event at a restaurant or country club. The Office of Alumni Affairs coordinates the design and printing of invitations and mails them to alumni, current and new parents, current and new students, and friends of the College. Details and directions to the event are posted on the alumni web site.

Questions can be directed to your alumni affairs liaison. Guests can make their reservations by phone, email, or the event web site. The Office of Alumni Affairs sends prepared name badges, the guest list, and small gifts for the new students. There is no charge to attend and the Office of Alumni Affairs reimburses the host or chapter up to \$500 when qualified by submitting original receipts. Hosts may opt for recognition as a gift-in-kind, or a combination of a gift-in-kind and reimbursement of up to \$500 with original receipts.

- The Lafayette-Lehigh telecast party is often co-hosted by a Lehigh alum. The College hosts about 60 such parties nationwide and is looking to extend to international sites as well. The Office of Alumni Affairs emails invitations and posts details on chapter home pages as well as the event web site found on the alumni home page. Reservations can be made electronically by visiting the College's telecast web site. Guests are responsible for their own costs of food and beverages.
- The annual chapter dinner offers the opportunity to visit with an honored guest, usually a faculty member, an administrator, or an alum. Often this is the key event of the year. Because of the importance of the annual dinner, it is recommended that chapter leaders notify their alumni affairs liaisons six months or more ahead of the event for the purpose of securing the guest speaker and requesting a printed invitation to be prepared, printed, and mailed. With this amount of advance notice, the alumni affairs liaison also will send out an electronic save-the-date message.



## Chapter Five: Chapter Events

- Lafapalooza: Lafayette's National Days of Service is a volunteer opportunity in mid-April. Chapters select a charitable organization or project in their community and schedule their service on the same weekend as other alumni chapters. Typically, the project lasts a few hours.

All projects are coordinated and promoted by The Office of Alumni Affairs. Usually, each chapter appoints an on-site coordinator who will recruit volunteers, share information about the project, and obtain directions to the event. Reports are shared on chapter home pages, the online "News from the Chapters," and the *Lafayette Alumni News*.

### COLLEGE-SPONSORED EVENTS

Some chapters may be the hosts for events sponsored by Office of Alumni Affairs. Examples include presidential events and the summer concert at Tanglewood. Tailgate parties at away games might be co-sponsored by the Office of Alumni Affairs and Friends of Football. Arrangements for these events will be made by the alumni affairs liaison and reservations and fees will be collected by the Office of Alumni Affairs.

For additional information on events general guidelines and helpful tips for events planning, Appendix VII, pages 30-34.

### ONLINE EVENT RESERVATIONS AND COLLECTION OF FEES

The Office of Alumni Affairs now offers the opportunity for alumni, parents, and friends to register online for chapter events through the Alumni Online Community. This new service provides guests with the opportunity to make payment through a secure online registration process. For details, contact your alumni affairs liaison.

### STATEMENT OF LIQUOR LIABILITY

Chapters serving alcohol at an event must be in compliance with all state regulations concerning the service and consumption of liquor. When working with caterers, ensure that they are properly licensed to serve alcohol.

The liability for a person or alumni chapter serving alcohol to someone who is intoxicated and has an accident, injuring themselves or others, is enormous. Often, the place/institution/person who last served liquor to that individual is liable. For this reason, all alumni chapter events serving alcohol must have Training for Intervention Procedures (TIPS)-certified bartenders in service. As Dining Services does on-campus, TIPS-certified personnel are instructed to refuse to serve alcohol to anyone they deem intoxicated. Please be aware of the liquor laws in your community when serving alcohol at an event.

# APPENDICES

## **APPENDIX I: FREQUENTLY ASKED QUESTIONS & ANSWERS FOR NEW CHAPTER LEADERS**

To assist new chapter leaders, the following questions have been posed and answers or references to the answers have been noted.

### **CHAPTER QUESTIONS: GETTING STARTED**

**1. How many people “in the area” do we need to start a chapter?**

There is neither a specific number needed nor formula used for determining how many alumni are needed to establish a chapter. Successful chapters vary in size from under 100 to over 3,000 alumni. The key element to success is leadership. The alumni affairs liaison will provide the chapter leaders with demographic information regarding alumni living within chapter boundaries and assist with identification of prospective chapter leaders.

**2. How many local alumni does it take to successfully run a chapter?**

See Model Executive Committee, page 5.

**3. How often should chapter meetings be held?**

Most chapters host at least 2-3 planning meetings per year in order to organize a schedule of events. For those members not able to attend in person, it is advantageous to host the meetings in locations that can set up conference calls.

**4. Should the chapter charge dues?**

Although it is encouraged, not all chapters collect membership dues. See Chapter Three: Finance, page 9.

**5. How many events should we host in the first year?**

In the first year of a new or revitalized chapter, it is common to host two or three events. See Chapter Five: Chapter Events, page 14 for ideas that have worked for alumni chapters and Appendix VII: General Guidelines for Event Planning, page 27.

**6. Should the chapter charge for events?**

All events should be planned on a break-even basis. Once the chapter is established and begins collecting dues to build a treasury, events may be subsidized by the chapter. For more information see Chapter Five: Chapter Events, Online Event Registration and Collection of Fees, page 17, and Appendix VII: General Guidelines for Event Planning, page 27.

**7. What is the most successful way to contact people?**

Best ways are by phone and email. Chapter news can be published on the chapter’s home page located on the College’s web site. For details of how the chapter may communicate with its members, see Chapter Four: Communications, page 12.

**8. How can I contact other alumni chapters to speak with their executive committee members for event ideas?**

Events are posted on chapter home pages and the online Alumni Calendar of Events. Contact information for the executive committee members is posted on chapter home pages as well. New chapter leaders are encouraged to contact established chapters for event ideas. A convenient source of event information for all chapters is the News from the Chapters

## APPENDICES

section of *Alumni News*, with more extensive description available in the online “News from the Chapters” feature on the alumni web site.

Each new alumni chapter will have an experienced chapter leader assigned as a mentor for as long as the relationship is helpful. Contact your alumni affairs liaison for the name of your chapter mentor.

### CHAPTER QUESTIONS: THE MISSION

#### 1. What is the chapter’s mission?

See Chapter One: Mission Statement and Purpose, page 1.

#### 2. Does the chapter “recruit” local high school students?

Many alumni chapters host annual welcoming events for new students prior to their leaving for their first semester at Lafayette. Although not an official function of an alumni chapter, chapter members may become alumni admissions representatives (AARs) and assist the Office of Admissions in its efforts to recruit new students. More information about the AAR Program can be found by visiting the admissions web site, [www.lafayette.edu/admissions/](http://www.lafayette.edu/admissions/), or by contacting Anne Marie Ferriere, AAR coordinator, [ferriera@lafayette.edu](mailto:ferriera@lafayette.edu), (610) 330-5079.

#### 3. Will the chapter be asked to raise money for the College?

Alumni chapters do not bear any direct responsibility for raising money for the College. All fundraising for the College is coordinated through the Office of Alumni Affairs and the Division of Development and College Relations.

### COLLEGE SUPPORT QUESTIONS:

#### 1. How does the College support a new chapter’s effort?

See Chapter Two: Chapter Organization, page 2 for a list of support services that new chapters may expect from the Office of Alumni Affairs.

#### 2. Will the chapter have a “dedicated” staff/contact person?

Every alumni chapter has an alumni affairs staff member designated as their alumni affairs liaison. For details of this relationship, see Chapter Two: Chapter Organization, page 4.

#### 3. Does the College promote the chapter events?

The Office of Alumni Affairs will work with chapter leadership to promote events via the web, emails, and printed invitations. Details for each event should be shared with the alumni affairs liaison at least three months in advance. All design and copywriting will be coordinated by the alumni communications editor. For purposes of consistency with other College publications, all designs will be created by the Office of Public Information. See Chapter Four: Communications, pages 12-13 for details.

The Office of Alumni Affairs will provide name tags, sign-in sheets, and the loan of a table banner for the registration table. Whenever possible, the alumni affairs liaison or another member of Division of Development and College Relations will attend the event.

#### 4. Will the College pay for events?

All chapter events should be based on the break-even philosophy. An exception may be events sponsored by the College, particularly presidential events. If a deposit is required and the chapter does not have a treasury to fund it, then deposits or full payment should be required from individuals when they are reserving for the event. The College may front the deposit and be reimbursed by the fees collected.

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Alumni Affairs will collect the fees and pay the vendor, if needed. See Chapter Five: Chapter Events, page 17 for details of online event reservations and collection of fees and Appendix XI, page 34 for information on the required IRS W-9 Form. Your alumni affairs liaison can provide additional details.

### 5. Does the College have updated contact information for the chapter alumni?

The College maintains a database of contact information for alumni and all alumni are eligible to post contact information in the Alumni Online Community. Any information posted in the Online Community is entered into the College's database. This database is used to generate all mailings to chapter members to promote events.

### 6. Will the College provide opportunities for staff visits (professors, coaches, and other staff)?

Members of the Lafayette faculty and staff (including coaches) are often willing to speak at chapter events, particularly when speaking engagements can be coordinated with professional conference travel. See Chapter Five, page 15 for details on how to arrange for speakers.

## **APPENDIX II: IMPORTANT COLLEGE WEB PAGES AND CONTACT INFORMATION**

### **ALUMNI WEB SITE [www.lafayetteexperience.com/alumni/](http://www.lafayetteexperience.com/alumni/)**

Sherrí Jones, director of alumni affairs  
[jones@lafayette.edu](mailto:jones@lafayette.edu), (610) 330-5041

Jamie C. Hughes '05, assistant director of alumni affairs  
[jhughes@alumni.lafayette.edu](mailto:jhughes@alumni.lafayette.edu), (610) 330-5899

Mary Pat Staats, associate director of alumni affairs  
[staatsm@lafayette.edu](mailto:staatsm@lafayette.edu), (610) 330-5036

Ruth Hutnik, office coordinator  
[hutnikr@lafayette.edu](mailto:hutnikr@lafayette.edu), (610) 330-5041

Lydia Spano, office assistant  
[spanol@lafayette.edu](mailto:spanol@lafayette.edu), (610) 330-5583

Jill Heilman, office assistant  
[heilmanj@lafayette.edu](mailto:heilmanj@lafayette.edu), (610) 330-5040

Dave Block '93, alumni communications editor, public information office  
[blockd@lafayette.edu](mailto:blockd@lafayette.edu), (610) 330-5749

**APPENDICES****ADMISSIONS WEB SITE** [www.lafayette.edu/admissions/](http://www.lafayette.edu/admissions/)

Anne Marie Ferriere, associate director of admissions, AAR coordinator  
[ferriera@lafayette.edu](mailto:ferriera@lafayette.edu), (610) 330-5079

**CAREER SERVICES WEB SITE** [ww2.lafayette.edu/~careers/index.php](http://ww2.lafayette.edu/~careers/index.php)

Rachel Moeller '88, associate director of career services  
[rmoeller@alumni.lafayette.edu](mailto:rmoeller@alumni.lafayette.edu), (610) 330-5115

**ANNUAL FUND WEB SITE** [www.lafayetteexperience.com/alumni/volunteer/annual\\_fund.html](http://www.lafayetteexperience.com/alumni/volunteer/annual_fund.html)

Kim Spang, associate director of development  
[spangk@lafayette.edu](mailto:spangk@lafayette.edu), (610) 330-5048

**ACADEMIC CALENDAR**

<https://www.lafayette.edu/calendar/events.php/25/>

**ALUMNI ONLINE COMMUNITY**

<http://www.alumniconnections.com/olc/pub/LFT/homepage.cgi>

**MARQUIS MAILER SUBSCRIPTIONS**

[http://www.lafayetteexperience.com/alumni/marquis\\_mailer/index.html](http://www.lafayetteexperience.com/alumni/marquis_mailer/index.html)

**LAFAYETTE NEWS BY EMAIL**

<http://www.lafayette.edu/tools/emailnews.php>

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**APPENDIX III:  
ALUMNI CHAPTERS BY STATE AND CATEGORY  
(UPDATED APRIL 2008)**

AZ: Phoenix (on horizon 2008-09))	(Staats)	SC: Charleston (on horizon 2008-09)	(Staats)
AZ: Tucson (on horizon 2008-09)	(Staats)	TN: Nashville (on horizon 2008-10)	(Staats)
CA: Los Angeles (on horizon 2007-08)	(Hughes)	TX: Dallas (established)	(Staats)
CA: LA/Orange County (established)	(Hughes)	TX: Houston (established)	(Staats)
CA: San Diego (on horizon 2007-08)	(Hughes)	VA: Richmond (on horizon 2008-09)	(Hughes)
CA: San Francisco (established)	(Hughes)	VT: North Vermont (established)	(Staats)
CO: Denver (established)	(Hughes)	VT: So. Vermont (on horizon 2008-10)	(Staats)
CT: Central CT (established)	(Staats)	WA: Seattle (established)	(Hughes)
CT: Fairfield (on horizon 2007-08)	(Hughes)	UK: London (established)	(Staats)
DC: Washington (established)	(Hughes)		
DE: Wilmington (established)	(Staats)		
FL: Gold Coast (established)	(Staats)		
FL: Gulf Coast (established)	(Staats)		
(Sarasota, Tampa Bay, Ocala)			
FL: Jacksonville (established)	(Staats)		
FL: Naples/Ft. Myers (established)	(Staats)		
FL: Orlando (on horizon 2008-09)	(Staats)		
FL: Vero Beach (established)	(Staats)		
GA: Atlanta (established)	(Staats)		
IL: Chicago (established)	(Staats)		
MA: Boston (established)	(Hughes)		
MD: Baltimore (emerging)	(Hughes)		
MI: Detroit (on horizon 2008-10)	(Staats)		
MN: Minn./St. Paul (on horizon 2008-09)	(Staats)		
NC: Chapel Hill (on horizon 2008-09)	(Staats)		
NC: Charlotte (established)	(Staats)		
NH: Manchester (on horizon 2008-10)			
NJ: Princeton (established)	(Hughes)		
NJ: Skylands (established)	(Hughes)		
NJ: North Jersey (established)	(Hughes)		
NJ: Jersey Shore North (established)	(Hughes)		
NJ: South Jersey (established)	(Hughes)		
NJ: Jersey Shore South (emerging)	(Hughes)		
NY: Albany (on horizon 2008-10)	(Staats)		
NY: Buffalo (on horizon 2008-10)	(Staats)		
NY: Long Island (established)	(Hughes)		
NY: NYC (established)	(Hughes)		
NY: Rochester (on horizon 2008-09)	(Staats)		
NY: Westchester (established)	(Hughes)		
OR: Portland (established)	(Hughes)		
PA: Bucks County (emerging)	(Hughes)		
PA: Central PA (established)	(Hughes)		
PA: Lehigh Valley (established)	(Hughes)		
PA: Northeast PA (established)	(Staats)		
PA: Philadelphia (established)	(Hughes)		
PA: Pittsburgh (established)	(Hughes)		

**Total: 54**

**Established: 35**

(The chapter hosts at least two events each year.)

**Emerging: 2**

(Our office has made contact and started the process of establishing a chapter.)

**On Horizon: 17**

(Targeted, but no contacts have been made up to this point. See targeted dates.)

**ALUMNI AFFAIRS LIAISONS:**

Mary Pat Staats  
Associate Director of Alumni Affairs  
(610) 330-5036  
[staatsm@lafayette.edu](mailto:staatsm@lafayette.edu)

Jamie Hughes '05  
Assistant Director of Alumni Affairs  
(610) 330-5899  
[hughesjc@lafayette.edu](mailto:hughesjc@lafayette.edu)

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**APPENDIX IV:  
LIST OF ALUMNI ASSOCIATION OFFICERS**

The list of Alumni Council members can be found on the Office of Alumni Affairs web site. Visit [www.lafayette.edu](http://www.lafayette.edu), select “Alumni,” “Alumni Association,” “Alumni Council.”

If you are viewing this manual electronically, click here:

[http://www.lafayetteexperience.com/alumni/association/index\\_001.html](http://www.lafayetteexperience.com/alumni/association/index_001.html).

**THE 2007-08 ALUMNI COUNCIL**

Jamie McLaughlin '76, Alumni Association president

Edward Auble '61, chair, [International Alumni Committee](#)

TBA, chair, [Undergraduate Relations Committee](#)

Simmone Chaddan '04, chair, [Young Alumni Committee](#)

Gregory Crawford '68, chair, [Alumni Admissions Representatives Committee](#)

James Dicker '85, Nominating Committee, advisory capacity

Sallie Howell '80, chair, [Career Services Committee](#)

Sherri Jones, secretary, [Alumni Association and director of alumni affairs](#)

William Kirby '59, vice president at-large and Nominating Committee at-large

Paul McCurdy '82, vice president, Programs, and Alumni Association president elect

Morgan Albus Mooney '03, chair, [Homecoming Committee](#)

David Reif '68, vice president, [Outreach](#)

David Schwager '84, chair, [Reunion Committee](#)

William Tucker '81, chair, [Chapters Committee](#)

Ellen Poriles Weiler '83, chair, [Volunteer Committee](#)

*2008-09 officers to be announced after July 1.*

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**APPENDIX V:  
MODEL CHAPTER BYLAWS**

**“Name of Chapter”  
of the  
Lafayette College Alumni Association**

**Chapter Bylaws**

**ARTICLE 1 – NAME**

The name of the organization shall be the \_\_\_\_\_ Lafayette Alumni Chapter, hereinafter referred to as the Chapter.

**ARTICLE 2 – PURPOSE**

The purpose of the Chapter shall be to foster a spirit of loyalty and friendship among alumni, students, parents, and friends of the College, through the coordination of student recruitment, educational, cultural and social activities, and community service, in an effort to advance the best interest of Lafayette College and its constituents.

**ARTICLE 3 – MEMBERSHIP**

Membership shall consist of those alumni, students, parents, and friends of the College who reside and/or receive mail in the \_\_\_\_\_ chapter area.

**ARTICLE 4 – OFFICE OF ALUMNI AFFAIRS STAFF LIAISON**

A member of the Office of Alumni Affairs staff shall serve as the chapter’s alumni affairs liaison, adviser, and consultant, providing recommendations to the chapter on past, present, and future activities and as executor, by accepting responsibility for the timely production and distribution (within the control of Alumni Affairs) of all promotional materials.

**ARTICLE 5 – OFFICERS/EXECUTIVE COMMITTEE**

**Section 1.** The business of the chapter shall be managed by its Officers/Executive Committee in accordance with the Bylaws of the Lafayette Alumni Association.

**Section 2.** Nominations for the Officers/Executive Committee shall be made by an appointed subcommittee and by self-nominations from members. The subcommittee shall prepare the slate of candidates. Elections shall be by majority votes of the chapter members present at the annual chapter event.

**Section 3.** Ex-officio Officers/Executive Committee members shall consist of the immediate past president and other representatives as designated by the President. Term of office shall be \_\_\_\_\_ years.

**Section 4.** A chapter officer or Executive Committee member may be removed when sufficient cause exists for such removal. The Executive Committee, in consultation with its alumni affairs liaison, shall adopt such rules for replacing officers and committee members as it may in its discretion consider necessary for the best interests of the chapter.



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**Section 5.** Vacancies in the Executive Committee shall be filled by a majority vote of the Executive Committee at the next committee meeting.

**Section 6.** The Executive Committee will determine a set location, time, and date for regular meetings with at least two weeks' notice according to the convenience of the majority of officers.

**ARTICLE 6 – FINANCES**

Contributions may be sought from chapter members as established by the chapter's executive committee. Financial feasibility of each activity shall be a major consideration of the chapter's executive committee.

April 2008

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**APPENDIX VI:  
SAMPLE DUES STATEMENT**

**Chapter Dues Notice**

Lafayette alumni, parents, and friends: \$25.

Alumni from the past 15 years: \$15.

Make your check payable to: \_\_\_\_\_ **Lafayette Alumni Chapter.**

Please enclose this card with your check and mail to chapter treasurer:

[Add name and address]

Name \_\_\_\_\_

Class/affiliation \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_

Preferred Email \_\_\_\_\_

Comments \_\_\_\_\_

\_\_\_\_\_ I would like to help plan events for the chapter.

Please note: This form may become obsolete in its paper format as the Office of Alumni Affairs launches the online registration program through the Alumni Online Community.

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### **APPENDIX VII: GENERAL GUIDELINES FOR EVENT PLANNING**

To ensure that the event runs as smoothly as possible, the event chairperson should outline every stage of the planning process.

#### **DAY AND DATE**

- Consult the chapter's calendar to make sure the event does not conflict with other activities.
- Check your standard calendar for possible conflicts with national or religious holidays.
- Local calendars will be of help in screening for desirable dates as they may include private and public school vacations, events of other organizations, and local athletic events.
- Check Lafayette's academic calendar to see if students will be able to attend.

#### **TIME**

- Time is the next most important factor besides the date.
- Chapters located in larger cities must accommodate travel time before or after rush hours.

#### **PLACE**

- Location is often the key to a successful event.
- Look at records of past events, if available, to see which locations brought in the greatest participation.
- A central location is advisable. Your alumni affairs liaison will be able to plot your membership on a map and help you determine the best area for a venue.
- If you are in a large metropolitan area, it is wise to alternate locations in the city every year if the event is an annual occurrence.
- Keep your eyes open for alternative venues to keep costs down.

#### **COST**

- General rule of thumb is that each function should pay for itself.
- Keep the cost of the event as reasonable as possible, as cost can be a factor when alumni decide whether to attend.
- Price breaks can be given to younger alumni or those with family to encourage their participation.
- Be clear when hosting a telecast party, for example, if the alumni are responsible for their own refreshments at the establishment where the event is held.
- In planning a luncheon or dinner meeting, be sure to get an estimate of all costs – rooms, services, menu, beverages, etc.
- Make arrangements for an itemized bill.
- If the chapter's alumni affairs liaison is handling the finances, check with the liaison to see if the vendor/restaurant has a W-9 Form on file with the College. No invoices will be paid without this W-9 Form on file.

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## ANNOUNCING THE EVENT

- Use printed invitations for more formal events. The Office of Alumni Affairs will handle all requests and would appreciate a minimum of three months for preparation and mailing invitations. See chart below for ideal timing.
- Email blasts can be used as the means of communications for smaller events. The Office of Alumni Affairs can send email blasts for chapters if given two weeks' notice.
- A designated chapter officer will soon be given access to the Alumni Online Community for the purpose of sending chapter email blasts out to alumni.

<b>HOW TO PLAN A SUCCESSFUL EVENT: 14-WEEK PLANNING GUIDE</b>	
<b>14 Weeks Before</b>	The executive committee should meet or otherwise communicate to confirm the date, time, and location of the event. Reservation of the location should be made. Determine how the alumni, parents, and friends will be invited. Note the time that it will take to have materials printed and mailed.
<b>12 Weeks Before</b>	Finalize information for the invitation. Request the print job for invitations to formal events or emails for less formal events from the Office of Alumni Affairs.
<b>8 Weeks Before</b>	Have invitations printed and mailed first class through the Office of Alumni Affairs.
<b>6 Weeks Before</b>	Hold an executive committee follow-up meeting, possibly by conference call. Make sure everything is running smoothly and solve any problems that may have occurred.
<b>5 Weeks Before</b>	Prepare program for event. If a College representative will be speaking, obtain a biography from the Office of Alumni Affairs and arrange for a chapter representative to serve as MC.
<b>4 Weeks Before</b>	Check in with executive committee to ensure details are running smoothly. Confirm speaker details (don't forget hotel arrangements, transportation, etc.).
<b>3 Weeks Before</b>	Organize a phone or email tree to contact those who have not made their reservations. Prepare publicity for local media, if applicable.
<b>Day of Event</b>	Arrive early to attend to details and greet arriving guests. Set out name badges. Have members of the executive committee mingle with guests before program begins.
<b>After the Event</b>	Take care of payments. Write event report (keep copy of invitations, paper trail of planning, guest list, etc.) and submit to alumni affairs liaison. Send thank you notes to all involved.

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### HELPFUL HINTS THAT MAKE A DIFFERENCE

- If the event has a speaker, acknowledge the speaker's acceptance of your invitation to visit the chapter.
- Keep your introductory remarks brief. Your audience will appreciate a certain amount of background information, but will not like being deterred from the purpose of the gathering.
- It is a courtesy to handle chapter business **after** the speaker has concluded his or her presentation.
- Use name badges whenever possible to jog hazy recollections and encourage new acquaintances.
- Plan early—tentative dates should be made a year in advance.
- Keep the Office of Alumni Affairs informed of upcoming events as soon as they are scheduled.

### MATERIALS CHECKLIST

- Lafayette banner for wall or table
- Podium or lectern with microphone and light
- Place cards for head table
- Guest register or sign-in roster
- Blank name badges\*
- Small basket or glass bowl in which back of name badges can be discarded
- Biographical sketch of guest speaker and/or head table guests
- Head table floral arrangements and decorations
- Pen, pencils, masking tape, etc.

\*It is best to print the name badges before the event and place them in alphabetical order on a table near the entrance. Keep a small supply of blank badges on hand for errors or name preferences, if given. The Office of Alumni Affairs will provide name badges and prepare them for the chapter if given appropriate time for processing.

### THE GUEST LIST

The type of event will determine whom you should include on the guest list. Obviously, some events are geared towards specific alumni constituencies (i.e., young alumni). Send invitations no later than six weeks prior to the event. Include on your guest list members from as many segments of your constituency as possible. Please consider the following:

- Alumni parents, alumni relatives, and non-alumni friends
- Alumni from surrounding chapters or geographic areas that are not specifically within the geographic boundaries of the chapter (e.g., Northern New Jersey and Connecticut for New York City)
- Current students and their parents
- Admitted students and their parents
- College trustees in the area

A phone or email committee can be helpful for increasing alumni participation, as printed or email invitations are often put aside and then forgotten. Prior to the event, members of a phone or email committee should contact those who have not yet made reservations to attend. A little extra effort goes a long way!

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### PROMOTING YOUR EVENT

It is essential that you have someone on the event committee in charge of promotion and publicity. This person should be able to communicate details about the event to as many alumni and friends in the community as possible. Consider the following successful methods:

- Announcements at chapter meetings.
- Email “save-the-date” notices to chapter members. Make sure you include a link to the chapter home page for details.
- Mailings to chapter alumni, parents, and friends of the College. Make sure you include a phone number and email address for questions about the events.
- Telephone or email reminders are often the most effective way. Personal contact shows people that you are making a special effort to invite them.
- Active chapters know a good, regularly mailed chapter electronic newsletter will bolster every aspect of chapter life. Announce events even when in the early stages of planning. Once the date is set, communicate it to your chapter members as soon as possible. Make sure to include a link to the chapter’s home page.
- Your chapter’s home page can be a quick and easy way to keep your members up to date on chapter news and events. Plus, the Office of Alumni Affairs will post the event on the College’s online alumni calendar of events, Marquis Mailer, daily email news service, and RSS feed. Many chapters include these topics in their sites:
  - Events
  - News
  - Contact information (e.g., a list of officers with phone numbers and email addresses)
  - Links (back to the College’s web site and the Office of Alumni Affairs web page)
  - Information on how to register for the Alumni Online Community.

Also, don’t forget to send the Office of Alumni Affairs an article about your event for the online and *Alumni News* versions of News from the Chapters. Digital photographs also may be submitted to the alumni affairs liaison.

### PHONE OR EMAIL TREES

- Need to get some news out quickly? Want to remind people to reply to an invitation? Try a phone or email tree. All you need are some volunteers who will help you contact chapter members and share your information. Typically, each volunteer contacts 5 to 10 members.
- The size of your chapter determines how many volunteers you need. To start the tree, the designated leader contacts his/her contacts, and they call their contacts, and so on.

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**APPENDIX VIII:  
SAMPLE ALUMNI CHAPTER INTEREST SURVEY**



\_\_\_\_\_ **Alumni Chapter**

Interest Survey for Alumni, Parents, and Friends of the College

\_\_\_ Yes, I would like to support the \_\_\_\_\_ Chapter.

Name \_\_\_\_\_

Class/affiliation \_\_\_\_\_

Address \_\_\_\_\_

City, State, ZIP \_\_\_\_\_

\_\_\_\_\_

Preferred email \_\_\_\_\_

Daytime phone \_\_\_\_\_ Evening phone \_\_\_\_\_

I am interested in planning events.

I am willing to serve as an event chairperson.

I am willing to open my home for a chapter event.

I belong to a club or organization that has a facility that the chapter might use  
(please name): \_\_\_\_\_

I would like to see the following events offered in the future (please list):

\_\_\_\_\_

*Send completed form to:*  
 Lafayette College  
 Office of Alumni Affairs  
 223 Pfenning Alumni Center  
 Easton, PA 18042-1768  
 FAX: (610) 330-5833

**Questions?**  
 Please feel free to contact one of the executive committee members:

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**APPENDIX IX:  
SUMMARY OF MEETINGS AND ACTIVITIES FORM****Alumni Chapter Annual Report  
Lafayette College Alumni Association  
Deadline: July 31**

An annual report is required to maintain status as a chapter of the Lafayette Alumni Association. Information provided should cover the period between July 1 and June 30.

NAME OF CHAPTER:

DATE:

PERSON COMPLETING THIS REPORT:

**CHAPTER PROFILE:**

1. Please list the names of alumni who are active members of your executive committee, and indicate leadership positions held. (Please attach a roster if additional space is needed).
2. Please describe the transition plan (if any) in place for your chapter leadership. Please describe the overall health of your chapter. Are there any special challenges it faces?
3. Does your chapter have a checking account?  
Yes or No                      If yes, please state the balance as of July 1:
4. Does your chapter have written by-laws? Y  
es or No                      If yes, please attach a copy to this report.

**CHAPTER ACTIVITIES:**

1. List each event held during the past fiscal year (July 1-June 30). It is important to include the date and approximate attendance at each chapter event. (Please attach a separate sheet if more space is needed.)
2. Which event did you feel was the most successful? Why?
3. Do you have any questions, comments, suggestions, or concerns that you want to share regarding the Office of Alumni Affairs and what it can do to support the chapter?

*Please complete this form and return it to*

Lafayette College  
Office of Alumni Affairs  
[alumni@lafayette.edu](mailto:alumni@lafayette.edu)  
FAX: (610) 330-5833

Please note: This form will be required annually as of July 2008.



**APPENDICES*****APPENDIX X: IRS W-9 FORM***

The W-9 IRS Form should be used when the chapter plans events and requests that the Office of Alumni Affairs handle the collection of fees and payment to the vendor. The following excerpt is from section (4) of Lafayette College's Reimbursement Policy.

You will also be responsible for obtaining the Federal Tax Identification Number of the business or individual that *was paid directly by you for the goods or services*. This is accomplished when you obtain an IRS W-9 Form from the Controller's Office and request the vendor to complete and sign the W-9 Form. The W-9 Form must include information about the vendor's name, address, form of business, and the Tax ID Number. The W-9 Form must be complete and legible. The College is required by the IRS to collect Tax ID information on all of the vendors we pay. The College is penalized if the W-9 Form information is not accurate.

If you pay the vendor, it is as if the College's Accounts Payable office paid the vendor. You must obtain the Tax ID Number and the College must report the payment depending on the total paid for the year.

Please Note: The W-9 Form will be obtained by Lafayette College's Purchasing Department if goods and services are ordered via purchase requisitions or limited purchase orders with approved vendors.

The form can be sent via email or faxed to vendors for completion.

Visit <http://www.irs.gov/pub/irs-pdf/fw9.pdf> to obtain the W-9 Form.

**APPENDICES****APPENDIX XI:  
ADDITIONAL ALUMNI VOLUNTEER OPPORTUNITIES**

Interested in getting involved in the life of Lafayette, but don't know where to start? You can choose from a wide variety of opportunities in many different areas. Whether as a representative at a high school college fair, a career services mentor, a summer picnic host or a class officer, Lafayette volunteers make a difference. For more information visit [www.lafayette.edu](http://www.lafayette.edu); click on "Alumni" and "Become a Volunteer." If you are viewing this manual electronically, use [http://www.lafayetteexperience.com/alumni/volunteer/index\\_new.html](http://www.lafayetteexperience.com/alumni/volunteer/index_new.html).

The following are additional ways you can volunteer for Lafayette with fellow alumni:

**ALUMNI ADMISSIONS REPRESENTATIVES**

Help recruit new students for your alma mater. Conduct interviews and represent Lafayette at college fairs. Visit the AAR web site: [www.lafayette.edu/admissions/aar/](http://www.lafayette.edu/admissions/aar/)

Contact: Anne Marie Ferriere, associate director of admissions,  
(610) 330-5079, [ferriera@lafayette.edu](mailto:ferriera@lafayette.edu)

**CAREER SERVICES**

Provide career advice to students and alumni; host an externship or internship; share expertise and passion for your work by participating in AlumNet or in panel discussions on campus.

Visit [www2.lafayette.edu/~careers/alumni\\_help.php](http://www2.lafayette.edu/~careers/alumni_help.php)

Contact: Rachel Moeller '88, assistant director of career services,  
(610) 330-5115, [moellerr@lafayette.edu](mailto:moellerr@lafayette.edu)

**CLASSES**

Become involved and help organize your class Reunion events. Serve as a class president, correspondent, or web page administrator; be a Reunion chair, volunteer or presenter.

Visit <http://www.lafayetteexperience.com/alumni/volunteer/assisting.html>

**LAFAYETTE ANNUAL FUND**

Participate in class and area fundraising events. Serve as a class fund manager, agent, or phonathon chair/caller. Visit [http://www.lafayetteexperience.com/alumni/volunteer/annual\\_fund.html](http://www.lafayetteexperience.com/alumni/volunteer/annual_fund.html)

Contact: Kim Spang, associate director for development, director of the Annual Fund  
(610) 330-5868 or [spangk@lafayette.edu](mailto:spangk@lafayette.edu)

**APPENDIX XII: ALMA MATER****ALMA MATER***Words and Music by Walter C. Stier, Class of 1884*

We'll gather by the twilight's glow  
 In front of old Pardee.  
 In all the world no other scene,  
 So fair, so dear to me.  
 O Lafayette, O Lafayette,  
 To thee our voices raise!  
 While loyal lips and loyal hearts  
 Unite to sing thy praise.

## Chorus

We'll gather by the twilight's glow  
 In front of old Pardee.  
 In all the world no other scene,  
 So fair, so dear to me.

And future years shall not erase  
 These gems of mem'ry rare;  
 But oft' we'll live the scenes again,  
 Impressed so firmly there.  
 O Lafayette, O Lafayette,  
 O joyous College days!  
 E'er while these loyal hearts shall beat,  
 We've loyal lips to praise.

## Chorus

We'll gather by the twilight's glow  
 In front of old Pardee.  
 In all the world no other scene,  
 So fair, so dear to me.



Lafayette College  
Office of Alumni Affairs  
223 Pfenning Alumni Center  
Easton, PA 18042  
(610) 330-5040, FAX (610) 330-5833  
1-800-LAFAYETTE (outside PA)  
[www.lafayette.edu](http://www.lafayette.edu)