

2008 Club Leader Handbook

The Alumni Association of the University of Michigan	2
Regional Relations Program	3
Club Structure	4
Important Contacts at the Alumni Association	5
Important Contacts at the University of Michigan	6
Benefits of Alumni Association Affiliation for Alumni Clubs	7
Michigan Alumni Connections (MAC) Database.....	9
Alumni Association Communications with Club Leaders.....	10
Publicity Tools for Alumni Clubs	11
Using Supplemental Mailings, Listservs, Regional e-TrueBlue and Web Site	13
Sending Email	14
Spam	16
Creating Your Own Club Mailings	17
United States Postal Service Rules and Processes	19
Alumni Association Style Guide	20
Frequently Asked Questions about Alumni Association Membership	22
Tips for Reaching Out to Nonmembers	26
Establishing a Club Scholarship Account with the University of Michigan	28
Maintenance and Operation of Club Scholarship Funds	30
Awarding Club Scholarships	31
Some Thoughts About Fundraising	33
Event Ideas for Club Scholarships	34
Volunteers: The Heart and Soul of Alumni Clubs.....	36
Recruiting Volunteers	38
Training Volunteers	39
Submitting Items to Regional e-TrueBlue.....	40
Producing a Supplemental Mailing.....	41
Finding a Club MAC Administrator.....	42
Finding a Club Webmaster.....	42
Using the AAUM Event Calendar.....	43
Best Practices: Being First and Best for All Alumni	44
Club Mission Statement and Bylaws.....	44
Club Events.....	45
Collaboration.....	49
Leadership Succession.....	50
Scholarship Fundraising.....	51
Student Recruitment.....	52
Public Relations and Promotion.....	53
Membership.....	55
Financial Basics: Handling Funds, Taxes and Insurance	57
Appendix: Forms and Documents	61
Volunteer Sign-Up Sheet	
Event Proposal	
Position Descriptions for Officers, Board Members and Committee Chairpersons	

The Alumni Association of the University of Michigan

The Alumni Association of the University of Michigan is a nonprofit, membership organization of University of Michigan graduates and friends. It was founded by alumni in 1854 and incorporated in 1897. It is tax-exempt under the US Internal Revenue Code section 501(c)(3).

The Alumni Association's mission is:

The Alumni Association of the University of Michigan is an independent, worldwide organization that nurtures lifelong relationships with and among current and future Michigan alumni. As a committed partner of the University, the Association offers programs of relevance and service to alumni and creates support for the University. Underlying all we do is the belief in the value of education to the well being of society and a commitment to integrity, diversity and service.

Governance

A 24-person board of directors and a 100-plus member Alumni Leadership Council advise and lead the Alumni Association. The Alumni Leadership Council studies, makes recommendations about and sometimes takes formal positions on critical issues facing the University and/or the Alumni Association. The group provides counsel to the board of directors on broad Association issues of strategy and direction. Council members must stay informed of Association and University issues and promote the Association to relevant constituencies, as well as advance the view of their constituencies to the Alumni Association. Some members are elected as at-large directors, while others represent U-M's schools, colleges, campuses and affiliate interests, including 15 representing clubs and regional alumni interests. The 24-member board of directors has full fiduciary responsibility and accountability for detailed decision making related to Association governance.

Staff

There are approximately 60 full-time Alumni Association staff members. They are organized into eight teams:

- Executive and University Relations
- Finance and Business Operations
- Internal Operations, Membership and Travel
- Marketing and Communications
- Michigania
- Regional Relations, Affiliates and Career Services
- Research, New Product Development and Implementation
- Office of Reunions

Finances

The annual operating budget of the Alumni Association is approximately \$6.6 million. The separate Michigania operating budget is approximately \$2 million. The Alumni Association's two largest revenue sources are membership dues (34 percent) and investment income from its endowment (41 percent). As with most service organizations, its largest expense is employee salaries and benefits.

Regional Relations Program

The regional relations program provides opportunities for engaging and connecting alumni that cannot be provided solely from Ann Arbor by Alumni Association staff. It partners the resources of a central office with the energy and connections of local alumni to create and deliver services and programs to alumni where they live.

Alumni clubs are a benefit of AAUM membership. All Alumni Association members are members of their local alumni clubs.

Alumni clubs and regional volunteers are encouraged to work together with staff and their representatives on the Clubs Council to create communication channels and activity paths with and among alumni. This collaboration is at the heart of creating a mix of opportunities for alumni engagement that blends what can best be produced locally with what can best be produced nationally.

The priorities of the regional relations program include:

- Sharing information with and from regional alumni, using a mix of electronic and print media
- Promoting volunteer leadership that reflects the diversity and interests of the regional alumni body
- Engaging more alumni locally in multiple ways
- Meeting the changing needs students progressing beyond their years at the University

As stated previously, the AAUM's mission is to bring alumni together on behalf of each other and the U-M. Its vision for itself is to be "first and best for all alumni." For the staff and volunteer leadership that developed this vision, this means that we:

- Identify what we can uniquely provide to our alumni family
- Identify what services and programs we do best
- Get alumni to think of the AAUM first for these services and programs

The collaboration among staff in regional relations is guided by the mission and helps achieve the vision.

Club Structure

The vastness of the Michigan family—more than 460,000 living alumni, who reside in every state and many countries—creates enormous challenges and opportunities for the Alumni Association’s regional relations team. In response to these, the AAUM board of directors has asked staff to focus their resources on areas where they can reach the most alumni. This means that some areas with modest alumni populations may not have formal clubs in their areas.

In these circumstances, “spirit groups” often develop to provide contact points for groups of interested alumni. In some cases, there is simply a local contact that has made him/herself known to the AAUM should the U-M have need in a region. Over time, it is hoped that staff and volunteer collaboration and creativity will lead to ever more effective ways to match AAUM resources with alumni interest.

Regional alumni clubs are organized into nine major alumni population centers “metro areas” and five categories of clubs grouped by the size of their alumni populations “virtual regions.” Several metro areas contain more than one alumni club.

Operating funds are provided to clubs from the AAUM budget. Clubs and spirit groups are not permitted to charge separate dues. Funding is based on the number of AAUM members living in a club area, typically a 50-mile radius around the city in which the club is centered. For the fiscal year 2008 (June 30, 2008–July 1, 2009), clubs received \$4.50 per AAUM member in their assigned areas. Clubs, in turn, are expected to report annually on their successful engagement of regional alumni in several categories of activity and service. Spirit groups receive limited staff and technical support from the AAUM, but do not receive any funding.

Club and spirit group interests consist of AAUM board of directors and the Alumni Leadership Council. Representatives from the board of directors and the ALC make up the Clubs Council. The Clubs Council meets during the twice-yearly meetings of the full AAUM board and Alumni Leadership Council. It may also form subcommittees that convene between meetings via conference calls. While the AAUM board of directors determines general policy matters, Clubs Council is instrumental in fashioning specific policies related to club interests and in working with staff to develop and implement regional programs and services.

For current information about current clubs, spirit groups and Clubs Council representatives, visit the Alumni Association’s Regional Clubs and Connections Web site at www.umalumni.com/clubs.

Important Contacts at the Alumni Association

Director of Regional Relations

Brenda Herman
734.763.9737
bherman@umich.edu

Senior Regional Relations Coordinator

Cindy Zimmerman
734.763.9742
zimmerc@umich.edu

Regional Relations Program Assistant

Rick Vanlittersum II
734.615.4329
rvanitt@umich.edu

Student Recruitment Coordinator

Phyllis Taylor
734.763.9752
phtaylor@umich.edu

Alumni Association of the University of Michigan

200 Fletcher St.
Ann Arbor, MI 48109-1007
800.847.4764 or 734.764.0384
m.alumni@umich.edu
www.umalumni.com

Important Contacts at the University of Michigan

Alumni Student Recruitment Coordinator (Office of Undergraduate Admissions)

Jim Vanhecke
734.936.3299
jvanheck@umich.edu

Club Scholarship Coordinator (Office of Financial Aid)

Scholarship Unit
734.763.4119

Athletic Ticket Office

734.764.0247
Hours: 8:30 a.m. to 5 p.m. Eastern Time, Monday through Friday

Athletic Department

734.647.BLUE (647.2583)

Development Office

Denise D'Allura
734.615.4098 or 734.647.6079
dallura@umich.edu

Alumni Records Office

734.647.6190

U-M Game Time Hotline

734.647.1253

Benefits of Alumni Association Affiliation for Alumni Clubs

As affiliates of the Alumni Association, alumni clubs receive a number of benefits and services from the Association.

Financial support

- Funding based on the number of AAUM members in the club's area
- Use of the AAUM's tax-exempt status for club activities
- Coverage for officers and club activities under the AAUM's insurance policy

MAC database access

- Ability to contact all alumni (both AAUM members and nonmembers) in the club's area
- Ability to set up a listserv through the AAUM

Web site

- Club's own Web site through CMS Made Simple
- Listing on AAUM's Web site and link to club's own site
- Publicity for club events through the AAUM's regional events calendar
- Publicity for some club events through Web publicity and online registration

e-TrueBlue

- Regional version goes out the last Friday of every month and contains up to six items for each club

Supplemental mailings

- Guarantee of one oversized postcard or tri-fold flier mailed to all AAUM members in the club's area at a time that is most convenient for the club (three for major metro clubs)
- Opportunity for additional mailing(s) as club requests, if budget allows

Football ticket program

- Opportunity for clubs to organize groups around attending a game

Merchandise and other items

- Balloons, nametags and membership brochures mailed to each club every summer
- Ability to purchase giveaways at a discounted rate directly from Moe's Sports Shops
- Ability to purchase Michigan items such as signed footballs and memorabilia signed by the coaches
- Opportunity to purchase business cards and name badges for club officers

Regional event support

- AAUM staff provides a speakers list consisting of faculty/staff that have a history of working with clubs as club speakers. In most cases, the local club will be responsible for all speaker expenses.
- Occasional opportunity for "big ticket" events co-sponsored by the AAUM

AAUM staff support

- Weekly electronic newsletter (e-TrueBlue: Club Leader) providing information about the University, the AAUM, the club program and best practices for clubs
- Regional relations staff dedicated to answering club's questions and providing assistance and guidance
- Regional relations staff provide guidance using AAUM resources such as MAC, the Web site, regional e-TrueBlue, supplemental mailings and the listserv

- The Club Leader Handbook, which is designed to assist club leaders in the maintenance and growth of the club
- The Club Leaders Web site, which provides an easily accessible way for club leaders to obtain important information such as the football ticket application, the annual report form, MAC documents and instructions, archived issues of e-TrueBlue: Club Leader, a breakdown of clubs by region and regional representatives on Clubs Council, sample bylaws and volunteer signup sheets
- Regional Relations-sponsored leadership workshops

Michigan Alumni Connections (MAC) Database

Michigan Alumni Connections (MAC) is a database used by authorized staff members who have the need to access in-depth information on alumni of the University of Michigan. MAC contains data on all graduates of the University, which means that it stores information in more than 700,000 records.

Alumni clubs that are affiliated with the Alumni Association have the opportunity to appoint one club officer to serve as the group's MAC administrator. After signing a compliance form, this individual is given access to the records of all alumni within a club's area. Access to the MAC database enables clubs to:

- Obtain postal and email addresses for members and nonmembers
- Determine the demographics of members within a club's area
- Perform targeted mailings
- Identify alumni who are new to a club's area

Through our shared experience using MAC, we continually strive to add more functions as we improve upon the database.

Alumni Association Communications with Club Leaders

The regional relations staff at the Alumni Association uses two primary tools to share information with all club leaders: the Club Leaders Web site and the electronic newsletter e-TrueBlue: Club Leader. We encourage you to take advantage of these opportunities to keep up-to-date with all the latest news related to alumni clubs.

Club Leaders Web site

The site is located within the Alumni Association's Web page. Follow the "Events, Programs and Clubs" menu at www.umalumni.com, click on "Regional Alumni Clubs," and then on "Club Leaders Web site."

The site contains contact information for Clubs Council and regional relations staff, archived issues of e-TrueBlue: Club Leader, the Club Leader Handbook, Best Practices for Alumni Clubs, necessary forms and more!

e-TrueBlue: Club Leader

Each Tuesday (every other Tuesday during the summer), the regional relations staff communicates with club leaders and board members through e-TrueBlue: Club Leader. This electronic newsletter contains news about the University and the Alumni Association. The newsletter also communicates policies and procedures and action items for clubs as well as great ideas from other alumni clubs.

It is important to carefully read e-TrueBlue: Club Leader on a weekly basis to make sure your club is in-the-loop on information and important deadlines. All board members who are listed in MAC as a club leader receive the newsletter. Additional leaders can be added to the newsletter email list by submitting their names, email addresses and name of the club to the regional relations coordinator.

Publicity Tools for Alumni Clubs

The Alumni Association offers a variety of ways to help clubs spread the word to alumni about all the activities they do:

e-TrueBlue

The Alumni Association's electronic newsletter e-TrueBlue is published every Friday and is sent via email to all Alumni Association members. On the last Friday of each month, e-TrueBlue contains region-specific content promoting events and programs by local alumni clubs. Each club can submit up to six items each month. Each club should have a contributing editor on its communications committee responsible for making sure items get submitted each month. A link to each club's Web site will be included in the e-newsletter, even if the club does not make submissions.

Copy for the newsletter is due by midnight nine days prior to the publication date. For example, if regional e-TrueBlue is being published on Friday, January 25, the content is due by midnight on Wednesday, January 16. Copy should be submitted at the following Web site at https://alumni.umich.edu/regional_etb. Additional information on regional e-TrueBlue can be found on the Club Leaders Web site under regional e-TrueBlue.

Club Web site

Each affiliated alumni club is able to maintain its own Web site through the Alumni Association's Web site. The more club Web sites are developed and updated, the more interesting they will be to members. Key elements to include on your club's Web site include:

1. Board/leadership contact information
2. Club's mission
3. Current event information
4. Summaries of recent events
5. Event calendar
6. Photos of club activities
7. Links to local information
8. Links to University information
9. Information about membership with a link to www.umalumni.com
10. Scholarship activities
11. Club bylaws

To find out how to set up a club Web site or change your club's Web site administrator, see Page 44.

Email

Since clubs have access to the email addresses of all Alumni Association members and nonmembers in their area, email is an efficient, cost-effective way to share your club's latest news.

Many metro clubs send a weekly listserv message to club members, sharing club news and details of upcoming events. Smaller clubs frequently send out emails on a bi-weekly or monthly basis. The following pages offer some useful suggestions and points to consider regarding electronic communications.

Supplemental Mailings

During the fiscal year, July 1-June 30, each club is allotted one supplemental mailing (three for major metro clubs). The mailing is designed, printed and mailed (bulk rate) by the AAUM. Clubs have a choice of an oversize postcard or a tri-fold mailer which will be mailed to all Alumni Association members in the club's area. For more information about how your club can produce a supplemental mailing through the Alumni Association, see Page 43.

Other mailings

Your club may choose to incur the costs associated with sending additional paper mailings. If so, we would encourage you to manage costs by targeting your mailing list to specific alumni groups or market segments. For instance, you might want to send the mailing to alumni who may not have email address. The regional relations coordinator can discuss ways to help you use MAC to target your mailing. Also, some printers will give a discount to a nonprofit organization, so be sure to shop around for the best deal possible. And don't forget to show your club's tax-exempt letter for extra savings!

The following pages offer some additional points to consider when preparing mailings.

Using Supplemental Mailings, Listservs, Regional e-TrueBlue and Web Site

Before you choose a medium, target your mailing list

Focus your marketing efforts on those who are most likely to respond, rather than appealing to everyone every time—which gets expensive. MAC allows you to search for alumni by their year of graduation. This can be helpful as you consider the nature of your event. For example, young alumni may be more likely to attend a happy hour, so you may consider targeting your mailing about an upcoming happy hour to recent graduates and prior happy hour attendees. Do not forget to include past event participants in your mailing list.

Postcards and tri-fold mailers

Postcards are fast and convenient. These work well for events that do not require a registration form. When you have more to say than you can fit on a postcard, the first thing to do is consider whether all the information is pertinent. If so, you may consider using a tri-fold mailer.

Listsrv messages (Email)

Listsrv messages are the best option for communicating with your club members quickly and cheaply. It is a particularly good option for regular announcements, reminders, and/or updates. Email messages should also be used to direct readers to your Web site, where more detailed information can be provided. The Alumni Association is committed to obtaining and retaining email addresses for all alumni and currently has a 82 percent member/household penetration rate. Your club can obtain its current email penetration rates from the regional relations staff.

Web site

Your club Web site is a valuable communication tool. When you need to convey more information than space allows in regional e-TrueBlue or your listsrv messages, you can use the club Web to provide more detail and information. Your mailings and emails should always contain your club's Web address, so alumni can easily access additional club information.

It is important to keep the information on your Web site current, as it is a convenient resource for alumni who are looking for up-to-date club information. Your Web site should include information about upcoming events, a list of your current officers, local and U-M links, membership information, instructions on joining your listsrv, club scholarship information and club photos.

Regional e-TrueBlue

Once a month, the regional version of e-TrueBlue newsletter contains information about club activities and announcements. This newsletter is sent to AAUM members only. As e-TrueBlue is sent to alumni beyond each club's territory, it allows the clubs to reach a much broader audience.

Sending Email

- **Mass email is defined as any single message that is sent to more than 10 members.**
- **We recommend that clubs create and maintain their automated listserv through the University of Michigan.** This allows the club to add and remove email addresses from lists. Contact Cindy at zimmerc@umich.edu to set up a listserv for your club.
- **Include the regional relations staff on your mass email list.** Please add Cindy at zimmerc@umich.edu and Brenda at bherman@umich.edu to all mass distribution lists.
- **Messages to your listserv should be sent at least once a month, but no more than once a week.** Messages sent more frequently than once a week are generally considered a nuisance. They may reflect poorly on both your club and the Alumni Association and may result in alumni asking to be removed from your list.
- **Pick a set day of the week to send your messages** so that your readers will come to expect a message from the club. Avoid sending messages over the weekend, as email boxes tend to be flooded with messages.
- **Do not include attachments.** Many computer users have been warned not to open attachments as they may contain viruses. In addition, some users may be unable to open your attachment. You can include a link within your message which can direct alumni to maps, registration forms and other materials.
- **Do not forward messages to your listserv.** It looks unprofessional and exposes the original sender's email address to everyone on your listserv.
- **Put ticket exchange information on your Web site, not in a listserv message.** Another alternative for ticket sales is to post a message on the Alumni Association's message board (alumni.umich.edu/messageboard/index.php) or in inCircle (umalumni.com/incircle).
- **Do not advertise outside products or merchandise for sale.** Use of the club listserv for marketing and selling of merchandise, other than Alumni Association or club programs and events, is prohibited.
- **Do not advocate, promote or lobby on behalf of any politician or political group.** As an affiliate of the AAUM, a 501(c)(3) organization, political involvement is prohibited and is a violation of our nonprofit status.
- **We recommend that clubs identify one listserv manager** who is responsible for managing message distribution and monitoring frequency and content.
- **Do not send spam.** Spam is any unsolicited commercial email, and it can be very upsetting to people. It can lead to loss of Internet access and lawsuits. This is why the opt-out section (see Page 16) is extremely important.
- **Opt-out information must be provided in all club listserv messages.** Include information directing readers how to contact the club in order to have their name removed from your email list. Send an acknowledgment to alumni who have been removed from the club's listserv that they have been removed.

- **Reassure readers that their email addresses are secure.** Include a brief statement reassuring readers that their email addresses are not sold and are safeguarded by you. Take precautions to keep the information secure. This includes making it impossible for recipients to send a reply to the whole list.
- **Keep email messages brief.** If you have a lot to say, you can always include a link to your Web site.
- **In the subject line, create an enticing subject** that compels the reader to open the message. Make sure the subject is not much longer than 25 characters. You want the entire subject and sender's identity to be seen in the mailbox before the message is opened.
- **Open your message with a standard greeting so readers know immediately who the message is from.** You may choose to say: "This message is from the University of Michigan Club of _____, sent from alumni to alumni" or some other brief, clear greeting that is used consistently.
- **Separate the information into clear headings.** This makes it easier for the reader to scan the message for the most important information.
- **Use short paragraphs.** There is nothing more boring to read than long blocks of text. Make sure there's plenty of white space between the words and paragraphs.
- **Avoid using all capital letters.** Research shows that most people interpret all caps in an email message as shouting.
- **Keep URLs short.** If they are more than 80 characters in length, they will likely be nonfunctional when readers receive your email.
- **Carefully check grammar, spelling, dates and locations before you send.** Do not send the message until you are confident that it has been carefully reviewed for errors.

Spam

Spam makes up a significant portion of all email traffic. Some studies have attributed more than 50 percent of Internet traffic as spam. Spam is any unsolicited email. Any promotion, information or solicitation that is sent to a person via email without their prior consent is spam. Sending volume email is one of the most powerful marketing tools available, but like powerful tools it has the potential for abuse or even the perception of abuse.

Examples of spam:

- Any email message that is sent to a recipient who had previously signed up to receive newsletters, product information or any other type of bulk email, but later opted out by indicating to the sender that they did not want to receive additional email
- Any email message that is sent to recipients who have had no prior association with the organization or did not agree to be emailed by the organization
- Any email message that is sent to a recipient without a way for a person to opt-out or request that future mailings be discontinued
- Any email message that does not have a valid email address in the reply-to line
- Any message that the recipient feels was unsolicited

As an organization, we commit to behaving responsibly and avoiding spam. To do so, we adhere to our approved mass email policy, require clubs to adhere to the mass email policy and make sure that the member always knows how to eliminate future contact. There will be a URL and/or email instructions included at the top or bottom of each message. In addition, we will remind members that they are receiving this email because they are alumni of the University of Michigan.

Reasons to avoid any appearance of spam:

- Upset customers
- Listed on anti-spam blacklists
- Loss of Internet access
- Lawsuits

If, in spite of all our best efforts, we make a mistake and offend members, we will always take immediate action by apologizing to the recipient(s) and making sure the error is corrected.

Creating Your Own Club Mailings

Composing text

- Approximately 200 words will fit on a postcard and 400 words will fit on a flier, based on a 10-point, Arial typeface.
- Use bullets and headings. These get your message across more quickly and effectively than paragraphs of text.
- Less is more. Provide information as simply, clearly and concisely as possible. Don't overload pieces with too much information. Trying to say too much in too little space is a sure way to lose the reader's attention.
- Don't include too many different messages in one piece.
- Include a cut-off date for responses. This gives readers a reason to respond quickly.
- Choose strong words for emphasis in headings and headlines.
- Keep sentences short.
- Use the active voice.
- Make sure you include all the pertinent information: date, location, time, directions, contact person, etc.
- Proofread; don't rely on Spell-check alone.

Use of type

- Use a readable font. We recommend Arial, Helvetica, Verdana, Times, Garamond and Palatino. Decorative typefaces and special effects are often very difficult to read and take the emphasis away from the message.
- Use a readable type size. We recommend using 8-12 point for text, depending on the readability of the font you choose and the age of your audience. For headlines, use 18-32 point, depending on the amount of copy, the readability of the font and how much space is available.
- Avoid using all uppercase letters. They are generally more difficult to read than lowercase letters.

Design rule of thumb

Organize your information first, and then present the information using headlines, text and images in an organized manner. Do not be afraid to leave empty space. This helps the reader digest the information.

Lead time

To get the best response to your mailings, give your readers plenty of time to react. Ideally you should plan for them to receive notice four to six weeks before an event.

Using the Block M

As an affiliate of AAUM, your club should use the Association logo and your club logo, if applicable, as the primary logos on your promotional materials. For some events, like sports-watching parties or something similar, you also may want to use the Block M logo. The Block M logo may be used for official University business without seeking approval for use. Approval is required for commercial use (merchandise sold for profit). For approval, contact Kristen Ablauf, Director of Licensing, at 734.763.4183 or kbracco@umich.edu.

Economical ways to send mailings

We are continuing to identify ways in which your club can send mailings efficiently and economically. The United States Postal Service has a service called Click2Mail (formerly NetPost). Several clubs have used this service and found it very user-friendly and cost effective. You can find information on this service on the USPS Web site at www.usps.com/mailingonline.

Using clip art

Simple drawings reproduce well when they are photocopied. Halftones and photographs do not produce as well. If you're looking to spruce up your mailing with art, you may want to consider using images offered free from Web sites, such as:

- office.microsoft.com/clipart/default.aspx
- <http://www.1clipart.com>
- www.clip-art-center.com

United States Postal Service Rules and Processes

- **Alumni Association indicia:** According to postal service rules, any mail sent with the Alumni Association's bulk-rate indicia must be mailed out of the Ann Arbor post office.
- **Priority mail drop shipping:** We will deliver club mailings produced by the Alumni Association to the Ann Arbor Post Office for priority mail drop shipment. This means that the post office will send the mailing to the most appropriate post office near you (based on what ZIP codes are included in the mailing). That local post office will then sort and deliver the pieces to either other local post offices (if there is a large diversity in the ZIP codes) or to alumni homes. Depending on where the mailing is going, the USPS reports that this process can take anywhere from three to 14 days from the time we deliver the mailing to Ann Arbor's post office to the time your local carrier delivers the mailing to your home.
- **The USPS requires us to use a periodical format whenever there is advertising* in the mailing.** Therefore, this copy will appear on the postcards and fliers: "Regional Alumni News is published irregularly by the Alumni Association of the University of Michigan. Vol. __, Issue __."

*According to the USPS, advertising includes the mention of a bar or restaurant for a football-watching party (the bar is being advertised), announcing the amount of money to be charged for a fund-raising event, and any fee requested or consideration given to a for-profit organization.

- **Applying for standard-rate indicia:** It may be possible for clubs to obtain their own standard-rate indicia if they want to mail out of their local post offices. The application is available at www.usps.com (search for "publication 417"). If your application is approved, the postal service charges an annual \$175 fee for maintaining the service. Not all organizations will qualify for these indicia, as the decisions are made by the local post office. Also, there are strict limitations on what type of information can be sent using the standard rate.

Alumni Association Style Guide

U-M

U-M can be used to refer to the University of Michigan in most cases. The one exception is when referring to a “U of M Club of Detroit,” etc.

Capitalizing events

Only capitalize your events if it is truly the name of the event.

For example:

“Our club’s annual dinner on May 14 was a huge success.”

“The club’s annual Go Blue Dinner on May 14 was a huge success.”

Capitalizing the word “club”

The word club should only be capitalized when it is used in a title, such as “U of M Club of New York.” When used in general sentences, it is not capitalized.

For example:

“Our club will be raising scholarship funds again this year.”

“The club’s annual dinner on May 14 was a huge success.”

Common words and phrases

email, not e-mail

online, not on-line

Web site, not Website or website

listserv, not list serve or listserve

Big Ten, not “Big Ten” or Big 10

U-M alumni, not U-M Alumni

Alumni Association of the University of Michigan, not the University of Michigan Alumni Association

Dates

Do not include the year when mentioning dates of upcoming events whenever the reader would logically assume the year. This is generally true for events that are coming up within the next three to five months. Only include the year when you are referring to a past or future event that could be confused with the present year.

Athletic matches

Be consistent in how you refer to the teams.

For example: U-M vs. MSU or Michigan vs. Michigan State

Not: U-M vs. Michigan State

Monetary amounts

Do not include the “decimal, zero, zero” when the figure involves no cents.

For example: \$22, not \$22.00

Telephone numbers

All telephone numbers are separated with dots instead of parentheses and hyphens.

For example: 800.847.4764

Web site addresses

Do not use the http://component.

For example: www.umalumni.com

Listing upcoming events in e-TrueBlue?

To maximize the space that is available, list events chronologically, in the following format:

November 16-20: U-M vs. OSU week
November 19: The Great Debate (U-M vs. OSU) at the Ohio Union, noon
November 20: U-M vs. OSU football
January 21: U-M vs. OSU hockey at the Schottenstein Center
February 6: U-M vs. OSU basketball-watching party at Rush Creek, 1 p.m.
February 14: Alumni Valentine's dinner, 275 Liberty Road, Wolverineville, 7 p.m.

Listing club officers in e-TrueBlue

Again, to maximize the space that is available, list officers in order of rank. Separate the title from the name with a colon, and then separate phone and email with commas, as you see here.

President: Ann Abner, 123.123.1234, abner@email.com
Vice President: Ben Bailey, 234.234.2345, bailey@email.com
Treasurer: Connie Crowley, 123.234.3456, crowley@email.com
Secretary: Dan Daly, 123.456.4567, ddaly@email.com

Frequently Asked Questions about Alumni Association Membership

Be sure you have the most up-to-date information about the benefits of Alumni Association membership so that you can encourage others to join or renew. We've compiled a list of the most frequently asked questions to help you out. If your question isn't answered here, send an email to m.alumni@umich.edu, or give us a call at 800.847.4764 or 734.764.0384. Also, check out www.umalumni.com for current benefit information. We have prepared a two-page member benefit tip sheet that highlights all the benefits. It can be found on the Club Leaders Web site.

Q: Why should I become a member of the Alumni Association?

A: Benefits, benefits, benefits! Members have access to a wide range of benefits, including alumni travel, career services, membership in your local alumni club, networking through inCircle, athletic programming, group rates on insurance and more. Membership is the best way to maintain a connection—to more than 460,000 strong—to the University of Michigan, its vast resources and the exceptional network of Michigan alumni. You'll also receive Michigan Alumnus magazine, a weekly e-newsletter and other special e-newsletters designed just for you. Membership in the Alumni Association meets your changing needs, beginning when you are a student and progressing beyond your years at the University. It also provides high-quality educational enrichment programs and information to U-M alumni.

Q: Can I join the Alumni Association of the University of Michigan if I'm not a graduate of the U-M?

A: Yes. The Alumni Association of the University of Michigan is for "alumni and associates" of the University of Michigan. The term "alumni" includes both U-M graduates and those who attended the U-M but didn't graduate. "Associates" means any non-graduate who has shown a strong affinity or relationship to the University, including spouses of graduates, advocates, parents and anyone who has an interest in supporting the University. If you think you are eligible to join as an associate member, simply send a letter along with your membership application telling us why you think you are eligible for membership. You can do this online, as well.

Q: How do I join the Alumni Association?

A: It's simple. You can join online at our secure server at www.umalumni.com; you can call us at 800.847.4764 or 734.764.0384; or you can print a PDF application off the website and mail it in—whatever works for you.

Q: How much does it cost to be a member of the Alumni Association?

A: Annual memberships are \$59 per year and include spouses or domestic partners residing at the same mailing address. Graduating seniors get a free one-year membership upon graduation. Recent graduates get a price break on membership. Those who have graduated within the last three years can purchase a joint or single membership for \$25 per year. Life

memberships are also available. A single life membership costs \$950; a joint life membership costs \$1,050 and both can be paid for in quarterly installments. Alumni 65 and older can purchase a discounted single life membership for \$475 or joint life for \$525.

Q: How many members do you have now?

A: There are about 104,000 members right now from an overall alumni base of more than 460,000 worldwide.

Q: Do you provide opportunities for us to serve the University of Michigan?

A: You bet! We recognize that our alumni are key to the continued success of the U-M. You can volunteer your services in many areas, including student recruitment, legislative advocacy in the state of Michigan, regional club activities, the relocation host program or the national alumni board of directors. A complete list of volunteer opportunities is available on our Web site (click on “Volunteering and Giving”).

Q: What other benefits do members receive besides the magazine?

A: There are all kinds of benefits, including the opportunity to purchase tickets to U-M home football games each spring, opportunities for foreign travel and international tours, athletic tours and all kinds of discounts, from hotels and rental cars to car insurance. But that’s just the tip of the iceberg. For a complete list of benefits, visit our Web site at www.umalumni.com. In addition, we have a network of more than 70 regional clubs to serve you no matter where you live. A brief list of the benefits we offer is included below. For a more detailed list of membership benefits, visit our Web site at alumni.umich.edu/membership/index.php.

Services and Program Benefits

Regional alumni clubs—As an Alumni Association member, you are automatically a member of your local club and receive member pricing at club events.

Michigan Alumnus—A quarterly alumni magazine containing news about the University, its alumni and, campus events.

e-TrueBlue—Our e-newsletter is sent weekly to keep you connected to U-M and in-the-know about Alumni Association programs and services. We offer a number of specialized versions, highlighting issues such as: sports, travel, student recruitment, career, recent grad issues and more!

NEW! University Library Access—Access to online resources at the University libraries. In an effort to serve the greatest possible number of U-M alumni, we have partnered with the University Library system to offer premier data base research access. Under the new agreement, the databases are available to U-M alumni who are members of the Alumni Association. To access, you need a University-assigned unqiqname and password, which are free to U-M alumni.

Relocation service and interstate moving discount—We'll connect you with U-M alumni who can give you the inside scoop on what's hot and what's not in your new city. We also offer discounts through our partnership with Steven's Worldwide Van Lines, who provides members with a 64 percent discount, in addition to many other service guarantees.

Career Services

Online job search tools and career resources—Our online alumni career services offer you everything you need to network, find a new job, polish your skills or move up the ladder. Through WORC (Wolverine Occupational Resource Center), you'll find resources typically only available to executive search firms, including self-assessments, resume tools and more. What's more, we've partnered with Advanced Career Development, Inc., to bring you a great rate on professional career counseling.

inCircle/Job Board—Our online networking community allows you to make social and professional connections by putting the power of your network to work for you. Job postings for alumni are also available here so you can use your network most effectively.

Career Enhancement Events—In partnership with our regional clubs, we host a number of career-focused events around the country, each featuring a prominent speaker. These events provide opportunities to build relationships that will help you advance professional and personally, acquire information on workplace trends and meet like-minded professionals. You'll receive special member pricing at these events.

U-M Athletics

Football Saturdays Ticket Program—Each year, the Alumni Association secures 1,000 tickets to each home football game and makes them available for purchase to AAUM members.

Go Blue (Homecoming) Tailgate—Celebrate Homecoming with us when you're back in Ann Arbor. Each year, the Go Blue Tailgate is the place to show your school pride. You'll receive member pricing at this event, which includes food, prizes, and appearances from the Michigan Marching Band, Alumni Cheerleaders and fun for the entire family.

Official Bowl Tours—Each time the U-M football team is invited to a post-season bowl game, the Alumni Association offers the exclusive University bowl tour. More than just a trip, our bowl tours are "the" Michigan football experience.

Travel and Recreation

Alumni travel—With more than 50 trips scheduled this year, our True Blue Travel programs are designed to meet the needs of all ages, interests and lifestyles. Our trips combine the convenience and unbeatable value of group travel with the flexibility to venture and explore on your own. And sharing your experience with other U-M alumni only enhances your enjoyment. We also offer visa and passport applications to make your vacation planning easier.

Camp Michigania—Located in northern Michigan, near Petoskey, on the shore of beautiful Walloon Lake, Michigania is the home of 11 week-long sessions of alumni camping in the summer.

Discounts on hotels and car rentals—As a member of the Alumni Association, you'll save at Wyndham Hotels and Resorts, Choice Hotels and car rental companies around the world.

NEW! Exclusive vacation lodging discounts—The AAUM has partnered with Interval Travel, a company at the forefront of the timeshare industry, to provide you with discounts on one-week stays at 2,200 resorts around the world.

Working Advantage—Discounts on Entertainment - Receive free access to www.workingadvantage.com, where you can find significant savings on movie rentals, movie tickets, admission to attractions around the country and online shopping.

Savings and Member Discounts

NEW! Tax-deductible membership dues—The Alumni Association's membership dues are tax deductible for individuals who itemize deductions. Please consult your tax adviser.

NEW! T-Mobile cellular service discount—T-Mobile is pleased to offer a 12 percent discount off your recurring monthly fee of T-Mobile products and service, waived activation fees and special promotions on equipment. Contact 866.464.8662 and use promo code 8977TMOFAV or go to alumni.umich.edu/tmobile.

Bank of America deposit accounts—We're pleased to provide you with preferred CD and Money Market Deposit accounts through Bank of America. The AAUM's CD has consistently ranked among the best nationwide, and the AAUM's Money Market has outperformed most money funds, as well as other bank money market and savings accounts, year after year. Additionally, these accounts come with FDIC insurance up to \$100,000 per depositor. To learn more about these programs, call 800.414.4229 and mention priority code HA046.

Bank of America credit card—We're pleased to offer an Alumni Association of the University of Michigan credit card featuring WorldPoints® rewards. Bank of America, the provider of this credit card, helps support the Alumni Association with every account opened and with each purchase made with the AAUM credit card.

Kaplan test preparation materials—You and your immediate family members are eligible for the following discounts from Kaplan: \$100 off GMAT, GRE, LSAT, MCAT, DAT, OAT, PCAT, SAT, ACT, PSAT and TOEFL classroom courses, premium online courses and private tutoring courses; 30 percent off real estate courses; 20 percent off CPA courses; 15 percent off ARE, FE and PE courses.

Prescription drug discount card—Whether your insurance doesn't cover prescription drugs at all or only covers certain medications, as an AAUM member you can save an average of 20 to 25 percent off prescriptions at participating pharmacies when you present your discount card. Card is valid only on prescriptions not covered by insurance. For detailed information on how to use the card and participating pharmacies, go to www.Rx2go2.com.

Health and life insurance—American Insurance Administrators provides a wide range of life and health insurance for alumni of all ages.

Auto and homeowners insurance—We have made arrangements with Liberty Mutual to offer alumni and friends of U-M a program that provides a savings of up to 10 percent on your auto and home insurance. Renters insurance is also available.

Tips for Reaching Out to Nonmembers

Increasing Alumni Association membership benefits local clubs in two ways: your club receives funding for every member and you get new people to participate in, generate ideas for, and perhaps even lead club activities. Here are some ideas for reaching out to nonmembers in your area and making them feel welcome at club events.

- Use the AAUM event calendar and your club's Web site. The AAUM receives phone calls and emails every week from nonmembers who are interested in finding out if there is an alumni club in their area and how they can become involved.
- Use the MAC database to download email addresses for nonmembers so that you can send email invitations to your next club event. Advise them that club events are for Association members, but that they are invited to learn more about the club and the Alumni Association.
- When sending an email to nonmembers, ask them to RSVP if they plan on attending an event. Match those who plan to attend with a "buddy" who is a current active member of the club. Have the member call or email the nonmember prior to the event to offer a welcome and to make arrangements to meet the nonmember at the event. Nonmembers will be a lot less apprehensive about attending an event if they know that someone is looking for them and will be there to greet them. At the event, the member can tell the guest about the club and introduce him or her to other members.
- Consider making club business cards with the club's name, Web site address and contact numbers. We can make these for you or you can make them yourself fairly inexpensively at Kinko's or elsewhere.
- Always have membership brochures on display at club events, especially at football-watching parties and happy hours, where it might be harder to keep track of who is a member and who is not. Be prepared to answer the question, "What are the benefits of being a member of the Alumni Association?" Take copies of the Membership Benefits Tip Sheet, which is available on the Club Leaders Web site, to your club events.
- Have sign-in sheets at events with columns for attendees to mark if they're members or nonmembers. Again, this could work especially well at football-watching parties, where nonmembers might not be as easily noticed. In a large setting such as a sports bar, simply circulate the sign-in sheet among the "Michigan crowd." In order to continue building your club's email directory, also include a column for attendees to list their email addresses.
- Make announcements at halftime of football-watching parties letting people know about upcoming club events. (Some sports bars will even make arrangements for you to use a microphone.) Be sure to give a special welcome to any guests who may be in attendance and introduce board members who are present so that nonmembers may approach them with any questions.
- Give nonmembers a Michigan trinket, such as a key chain or pennant, the first time they attend a club event.
- Have a discounted price for members at club events as encouragement for nonmembers to join. But remember, when it comes down to the actual event, be careful not to alienate members and nonmembers alike by requiring proof of membership. Nonmembers who may attend at a member price are more likely to join the next time they attend one of your events.

- After nonmembers attend an event, follow up with a phone call, email or note to say how glad you are that they came and how much you enjoyed meeting them. Enclose a club business card, if you have them.

Establishing a Club Scholarship Account with the University of Michigan

Clubs currently have three scholarship account options:

- Endowed account (minimum \$50,000)
- Expendable account (minimum \$10,000)
- Start-up account—this is a pooled account that holds scholarship monies for clubs until they can accumulate enough to open an 'official' endowed or expendable account

For more information about any aspect of club scholarship, contact Denise D'Allura, Director of Development for AAUM, at 734.615.4098/800.847.4764, or dallura@umich.edu, or 200 Fletcher St., Ann Arbor, MI 48109-1007.

Advantages of setting up an Alumni Association scholarship account

1. Tax deductibility of donor gifts
 - Gifts to the University of Michigan/Alumni Association are tax deductible within the limits allowed by law
 - Michigan residents receive state tax credit for their gifts to the University
 - Matching gift companies recognize the University of Michigan/Alumni Association in their giving programs
2. Donor recognition
 - Donors to club scholarship funds receive prompt recognition for giving to the University
 - U-M records gifts and sends University gift receipts to individual donors
 - Gifts to club funds are credited as gifts to University capital campaigns
 - Gifts to club funds are credited toward University recognition societies
 - Donors' giving history is accurately recorded—this will provide future leads for potential donors
 - Annual account summaries are provided to club officers
 - Donor reports are provided to club officers

In addition, endowment funds have the advantage of being invested in the University's endowment portfolio, which performs in the top quartile in the country.

INVESTMENT PERFORMANCE

Net of Fees and Expenses

Periods Ended June 30, 2007

	1 Year	3 Years Annualized	5 Years Annualized
University Endowment Fund	25.6%	20.3%	17.2%
Median College and University Endowment*	19.3%	15.1%	12.9%

* Based on Cambridge Associates' endowment survey of about 130 college and university endowments.

The Office of Financial Aid (OFA) holds the administrative responsibility for U-M club scholarship funds. AAUM, working with the U-M, assists in individual and regional gift solicitation and planning, which includes working directly with clubs and interested regional volunteers.

Services provided by OFA include:

- Identification of prospective applicants and determination of applicants' financial need.
- Distribution of scholarship payments to recipients' U-M accounts.
- Selection of recipients upon request.
- Review of club criteria/guidelines for compliance with University policies.
- Assistance with scholarship applications.
- Posting of club scholarship information and applications on the OFA Web site.

Maintenance and Operation of Club Scholarship Funds

Distributing club scholarship awards to recipients

- Standard procedure is to credit students' accounts (one-half of annual award each term) from club scholarship funds given to the University. The club notifies the OFA Scholarship Unit, giving name, address, U-M ID and the dollar amount for each of its recommended recipients. The funds are credited to the students' accounts and applied toward tuition, fees and/or housing expenses.

Monitoring the balance of club scholarship funds

- By request, the Financial Operations Office sends annual reports to the clubs. If interim reports are needed, clubs may contact the OFA Scholarship Unit.

Processing donations to the scholarship fund

- Individual donors should make checks payable to the University of Michigan and designate the club scholarship name or account number on the memo line of the check or in a cover letter accompanying the check. Unless a club has a 501(c)(3) status, donations are tax deductible only if checks are made payable to U-M.
- All gifts should be sent to Denise D'Allura, Director of Development, AAUM, 200 Fletcher St., Ann Arbor, MI 48109-1007.
- The University will issue a gift receipt for each individual check received, and AAUM will send a thank you letter.
- Many clubs feel it is important to personally thank contributors to their scholarship fund with a note from the president and/or scholarship chair. AAUM will provide club officers with donor contact information upon request.

Awarding Club Scholarships

Notifying area students that your club awards a scholarship

- Many clubs send letters or make personal phone calls to admitted students from their area, congratulating them on their acceptance to Michigan and encouraging them to apply for the club's scholarship. Some clubs send letters to all area students who attend Michigan and some only send letters to those "pre-screened" students who meet the grade point, financial or other criteria required for the scholarship.

- If your club is interested in sending a letter to all newly admitted students from your area, lists may be obtained by submitting a request form, available on the Club Leaders Web site or through the Office of Undergraduate Admissions. For the most complete list, request lists for delivery after April 15. Contact:

Jim Vanhecke, Director of Alumni Programs
Office of Undergraduate Admissions
1220 Student Activities Building
515 East Jefferson St.
Ann Arbor, Michigan 48109-1316
734.936.3299
jvanheck@umich.edu

- The Alumni Association sends lists of current students' contact information to club presidents, via email, in the fall and winter terms. Please use these lists if your club would like to send a letter and/or scholarship application to returning students from your area.
- If your club wants to send a letter and/or scholarship application only to area students who meet designated criteria, contact OFA:

Office of Financial Aid—Scholarship Unit
2011 Student Activities Building
515 East Jefferson St.
Ann Arbor, Michigan 48109-1316
734.763.4119
financial.aid@umich.edu

- Another way to notify students that your club has a scholarship available is to contact local high schools' guidance departments so that guidance counselors can have your scholarship information on file for interested students.
- Put information about your scholarship (and even the application) on your club's Web site.

Selecting the recipient(s)

- Some clubs elect a scholarship committee, headed by the scholarship chairperson, to review applications and conduct personal interviews, if applicable. For some clubs, a board of directors will make the determination as to who the recipient(s) will be.
- A selection committee size of three to five members is recommended.
- Depending on the number of scholarship applications a club receives, some clubs that require a personal statement or essay as part of the application allow all members to review and vote on them, usually at a club event or monthly meeting.
- OFA recommends that for maximum impact, recommendations for scholarship recipients be made by the end of March.
- OFA will select a scholarship winner on behalf of the club, if the club would prefer. OFA will review grades, test scores, geographical area, need, etc., to select the top candidates (i.e., highest grades and greatest need). Contact the OFA Scholarship Unit for more information.

Notifying the recipient(s)

- Send a recommendation form to OFA, listing students recommended for club scholarships.
- OFA asks that clubs not notify scholarship recipients of their award until the recipients have been approved by OFA. The approval process involves matching the recipients' profile (GPA and financial need) against the clubs' designated scholarship criteria (which should be on file with OFA).

Be sure to tell the recipient how he or she will receive the money. Scholarships are credited directly to the student's University account (one-half of annual awards each term) and applied toward tuition, fees and/or on campus housing expenses. Scholarships in excess of expenses are refunded by mail to the student or the student's bank account, if he or she has direct deposit. OFA does not generate checks for clubs to give to a student. Paying a student through the standard University processes ensures that the student is in good academic standing and is enrolled for the period in which he or she is receiving the scholarship.

Some Thoughts About Fundraising

As Joan Flanagan points out in “The Grassroots Fundraising Book,” the key to raising money is finding people who have a passion for your cause. Flanagan calls this quest “identifying the believers.” To illustrate her point, she states that a non-targeted “shotgun approach” mailing asking for money will generate, at best, a 3 percent return. This mailing will undoubtedly incur more costs than will be generated in contributions. If, however, a second mailing is sent to those who responded to the first, an organization can expect a 75 percent return. That’s because the organization has identified the believers. Flanagan concludes that “...raising money from the believers is easy. It’s identifying the believers that’s costly and time consuming.”

Cultivating Potential Donors

Here are some ways to begin building friendships with individuals who may be later identified as “believers”:

- Use events to promote your scholarship by displaying materials and talking about the program
- Use club resources to promote your scholarship efforts—e-TrueBlue, listservs, mailings and the club Web site are all promotional resources
 - Tell stories about the students and the impact of the scholarships
 - Talk about why their gift is important
 - Communicate the message multiple times—consider six mentions per year
- Use club functions to learn more about the giving potential and interest of new potential givers
- Take the opportunity to personally get to know donors to your fund

Asking for Gifts

- Have a plan to ask; contact Denise D’Allura for coaching and guidance at dallura@umich.edu
- Personal approaches like face to face solicitation, a personal letter, or personal email are much more effective than a mass mailing
- If you don’t ask, they won’t give
- In her book “Growing from Good to Great,” Dr. Judith Nichols states that there are only two ways to raise money: renew existing donors or acquire new ones. For most nonprofits, it’s clear that focusing on renewal of existing donors and working to upgrade their level of giving is a much more cost-effective way to raise money. Nichols explains, “It takes five times as much work to attract a new donor as it takes to renew an existing donor.”

Stewarding Gifts

- Write a thank-you note to all club donors. Look for ways to personally demonstrate the impact of donor gifts through stories
- Use club tools like e-TrueBlue, listservs, mailings and the club Web site
- Personally acknowledge the impact by connecting your donors to the students they support
- Make the connection for people that their contribution really is reaching a “real” person. One volunteer recently wrote the following: “One of my close friends operates a nonprofit which provides scholarships for single parents to further their education. In my opinion, the single most impressive tool that my friend and his board of directors have at their disposal is the ‘testimonial’ presentation by a recent graduate. Executives and board members could talk for hours about the quality of the program, and it won’t have the impact of a five-minute, straight-from-the-heart presentation by a successful graduate. That’s just a fact.”

Event Ideas for Club Scholarships

Following are some ideas to spread the word and raise money for club scholarship funds. It should be noted that many of our larger clubs run hugely successful, large-scale fundraising events, such as the Congressional Breakfast in Washington, DC, Sports-o-Rama in Chicago, and the Football Bust in Detroit. We applaud these clubs and others that put on such large events, and the fact that others aren't included in this list does not diminish their importance. This list is an attempt to share ideas that clubs of all sizes and geographic locations may use.

- Purchase or get someone to donate a set of football tickets to one of the games. Allow members to purchase raffle tickets for the game tickets at summer events and at early-season football-watching parties, and draw the winner a few weeks before the game.
- As an alternative, auction off a pair of football tickets to the highest bidder.
- Hold a pancake breakfast (or barbecue or similar type of event), with all proceeds from ticket sales going to the scholarship. Frequently a member's church or a community center will allow free use of the kitchen and dining facilities, or a member's home may work for an outdoor event.
- Have a 50/50 raffle at large-scale events such as happy hours, baseball outings or football-watching parties. Half of the money generated from ticket sales goes to the scholarship fund; the other half goes to the person whose number is drawn.
- Add an extra few dollars to the cost of attending club functions, with proceeds going to the scholarship fund. If a club's break-even cost for an event is \$10 per person, charge \$11 or \$12.
- Have a wine and cheese tasting, with proceeds going to the scholarship fund. If vendors see this as an opportunity to educate a new audience about their products, they may be very willing to work with a club on such an event. If it is not possible to have the event at a vendor's establishment, a community room at a member's condominium complex is usually a free or a low-cost option.
- Hold a silent auction or a sale of U-M apparel (Moe's Sporting Goods in Ann Arbor has been known to provide discounts to clubs) in conjunction with the scholarship fundraising event.
- Raffle off items such as autographed footballs, hockey pucks and basketballs. Clubs may purchase items by contacting the Alumni Association's regional relations office. Many clubs do this at annual meetings or at football-watching parties. Several clubs will sell raffle tickets throughout the football season and draw the winner(s) at the Ohio State game or at the bowl game-watching party.
- As an alternative, auction off autographed items to the highest bidder.
- Have a silent "meal" auction in which members of the club (or members of the board) donate menus that they would prepare. Menus are auctioned off to the highest bidder, and the cooks are not revealed until the menu is sold. This leaves a lot of suspense as to who will be cooking for whom. The date of the meal is arranged by the host and the winner; it's a great way for club members to get to know one another. Sample menus include:
 - Specialty coffee and dessert for four

- Spaghetti dinner for six
 - Fondue for four
 - Belgian waffles and Canadian bacon for two
- Hold a car wash.
 - Have a club garage sale.
 - Find out if local grocery stores participate in any sort of “coupon days” program. The Jewel-Osco chain in the Midwest used to allow nonprofit organizations to sign up for certain “coupon days.” The store and the nonprofit worked together to determine the days, and then the store issued coupons to the nonprofit for distribution among its membership and the general public.
 - During the holidays, ask a local department store (Wal-Mart, Kmart, etc.) if the club can set up a gift-wrapping table near the door. Ask for donations or charge set prices depending on the size of the item that’s being wrapped.
 - Sell club T-shirts, sweatshirts, hats or other merchandise, with proceeds going to the scholarship fund.
 - Have a golf outing. Some ideas for raising money include:
 - Hole sponsorship. Have companies pay to sponsor each hole in exchange for being able to place a sign at the hole advertising the company and being able to be mentioned as a sponsor of the event on the club’s Web site.
 - Create a challenge in which players bid money that the ball they hit on their first drive from the tee lands on the green. If it does, they get double their money back. If not, it goes to the scholarship fund. (Experience shows that most people will tell the club to keep the money, even if they hit the green.)
 - Sell mulligans.

An important note about raffles

- Be sure to check with your state’s gaming/lottery office for state rules about raffles. In the state of Michigan, an organization must apply for a gaming license if it will be raffling off items that are more than \$100 in value.
- Sometimes, in lieu of a monetary gift, an alumnus might offer a gift-in-kind donation to the club for a scholarship raffle or club use.
 - Gifts-in-kind are gifts of tangible or intangible personal property (other than gifts of cash or investment securities) that are deductible by the donor under federal tax law. Examples of gifts-in-kind are gifts of artwork, books, equipment, automobiles, inventory, patents and royalties. Acceptance and use of gifts-in-kind are subject to regent bylaws and policies of the University.

The regional relations staff is always interested in knowing what clubs do to raise money for their scholarships. If you have an idea that you’d like to share with other clubs, contact the regional relations coordinator. If you are interested in finding out more details about any of these ideas, contact Cindy Zimmerman, the regional relations coordinator, at zimmerc@umich.edu.

Volunteers: The Heart and Soul of Alumni Clubs

People are busy. We all know it. The outlook for finding volunteers to work with your club, however, is not hopeless. Recent studies have shown that voluntarism is on the rise, especially among people under the age of 30 and over the age of 50. In fact, 98 percent of younger adults (aged 25-40) indicated a belief that a great deal of satisfaction is gained from volunteering, and 76 percent think it's important to include volunteer activities in their lives.

A recent survey reported that people are increasingly likely to prefer sporadic or one-time activities to sustained efforts requiring a regular commitment of time. According to the study, 41 percent of all volunteers prefer episodic assignments compared with 39 percent who prefer to take part in regularly scheduled activities.

In 2002, an estimated 50 percent of Americans were involved in some sort of volunteer activity—the highest percentage ever recorded and a 13.7 percent increase from the previous year. And, among those not currently volunteering, 60 percent are at least somewhat interested in becoming involved.

What volunteers can do for your club ... if you let them

“No man is so poor as to have nothing worth giving. Give what you have. To someone it may be better than you dare to think.”

—Henry Wadsworth Longfellow

Since it is sometimes difficult to find volunteers for your club, you may ask yourself if it's even worthwhile to try to find them, especially since many club leaders get used to doing everything themselves, anyway. Here's just a sample of why volunteers can be your club's biggest assets. Volunteers can...

- Re-energize the club
- Do some of the work
- Supply expertise that the club needs
- Coordinate other volunteers
- Lead you to additional volunteers
- Bring new connections to community resources, such as sponsors, speakers, etc.

What do people hope to get from their volunteer experiences?

In order to understand how to recruit and retain volunteers, it is important to first understand what motivates people to volunteer. Different people have different reasons for wanting to get involved in an alumni club or another volunteer opportunity. Having a sense of why an individual wants to be involved will help you convince him or her to become and stay involved.

Here's a list of some common reasons people say they volunteer:

- To give back to an institution they feel has helped them
- To feel like part of the solution and to influence the organization's future
- To have fun
- To be with people who share their values or experiences
- To bring more balance into their lives
- To expand their social circles
- To network professionally

- To strengthen a resume
- To support an institution they feel passionate about
- To use skills they don't use on their jobs
- To enhance skills they use on their jobs
- To share time with their families
- To get out of the house
- To feel useful and needed

A recent study reported that “a sense of satisfaction” was people’s primary motivation for volunteering, with 53 percent stating it was an extremely important motivator. Close behind were “I have special skills to share” and the desire to “give back,” each of which were listed by 51 percent as extremely important motivators.

Match members’ motivating factors with the needs of the club

As you read through this list, you probably found at least one (if not more) of these apply to you. You can also probably think of different people on your board or in your club who fit these different categories. When contemplating how to approach people to volunteer within your club, think about their motivations and how you can match their motivations to the help your club needs. For example:

- A person who is motivated by the thought of having fun might be a great member of your programming team, thinking of fun new ideas for club activities and icebreakers.
- A person who is motivated by the opportunity to expand his or her social circle might be very interested in serving as your club’s contact on the relocation service Web site. He or she could also be a wonderful greeter/host at club functions.
- A person who is interested in networking professionally might be interested in coordinating a career or networking event.
- A person who wants to share time with his or her family could take the lead on planning family-oriented club events, such as trips to a local zoo or amusement park. He or she may also want to organize service projects, like Habitat for Humanity or a park clean-up project that the whole family could participate in together.
- A person who feels compelled to give back to the University in thanks for what he or she received from the University may be the perfect candidate to become involved in your club’s student recruitment or scholarship efforts.
- A person who has limited time for club activities because of work or family might be an excellent “virtual volunteer”—administering MAC, updating the Web site or performing other club volunteer tasks from the comfort of home.

Recruiting Volunteers

Once you have a sense of the motivations of your club's potential volunteers, the following tips will help you recruit them from potential to active volunteer, no matter how different their motivations may be (desire for a social or professional network, interest in "giving back" to the University, etc.).

Ask them directly

- It may seem like common sense, but many organizations fail to use the easiest way of recruiting volunteers: the direct ask. A recent survey entitled, "Giving and Volunteering in the United States" found that only 22.3 percent of people volunteer to volunteer, that is, offer to volunteer when they're not directly asked to do so. On the other hand, 89.5 percent of people volunteered when they were asked. If your club solely relies on people who are interested in volunteering to approach you, you are ensuring that your volunteer pool will soon be dry. Potential volunteers may be sitting at home, thinking their services are not needed.
- Assume that your members are interested in volunteering and just need the right point of entry. When you expect that your members are interested in helping, you approach recruiting in a much more positive manner. The idea of the "right point of entry" goes back to identification of your members' varying motivations.

Make it easy to get involved with the club

- Use the "Volunteer Sign-up Sheet" included in the Forms and Documents section of this handbook at every club event. This will not only help you track member participation, it will also allow potential volunteers to make themselves (and their interests) known to you.
- Advertise the club's need for volunteers in club mailings, regional e-TrueBlue and on your club Web site. Modify the position descriptions found in the "Club Officer, Board Member and Committee Position Descriptions" document found in the Forms and Documents section of this handbook and use them in your club's ads for volunteers.
- Remember that your volunteers are bombarded on a daily basis with demands on their time; multiple exposures increase the odds that members will pay attention to your request.
- Create club business cards for board members to carry in their wallets. The business card should contain the club's name, Web site address and any other desired club contact information. Visit www.umclubs.com/clubleaders/BCardSamples.PDF for business card samples.

Be specific about your club's needs

- Instead of a generic call for volunteers, let potential volunteers know exactly what sort of assistance the club needs. A generic solicitation may turn off potential volunteers in three ways: they'll assume what's needed is more than they have time for; they'll assume what's needed is probably not something they know how to do or are interested in doing; they'll assume that someone else will probably do it. Give copies of the modified club officer, board member and committee position descriptions document to potential volunteers so they know both the skills necessary for a volunteer position and your expectations.

Training Volunteers

Know the Alumni Association's and the club's mission.

- In order for your club to have effective volunteers, they must know the club's purpose and goals, as well as the Alumni Association's. Consider photocopying the Alumni Association's mission statement to distribute to your board; see Page 2.

Clearly define each volunteer's responsibilities and what's expected of them.

- If you expect volunteers to attend all club activities, be sure to let them know up front. Let every board member and committee member know if there is an expectation that they attend a minimum number of board meetings. Distribute copies of the club officer, board member and committee position descriptions document for your club to every board or committee volunteer.

Make sure that parameters or guidelines are clearly drawn—any “forbiddens,” legal limitations, etc.

- Nothing will discourage a volunteer more than if she puts a lot of effort into planning an event only to find out that it isn't covered under the club's insurance or is otherwise not appropriate. If the club has policies for reimbursing volunteers for expenditures, approving events planned by volunteers, etc., let volunteers know what those are before they waste their time and energy.

Educate your volunteers about the workings of the club.

- Share copies of the club's bylaws with your volunteers. You may also want to develop an organizational chart showing the club's board and key people at the Alumni Association with whom they are likely to interact, such as the regional relations coordinator.

Consider a volunteer buddy system.

- The volunteer buddy system is where a new volunteer is paired with a more seasoned veteran who can serve as a resource, encourager and all-around “go-to” person.

Submitting Items to Regional e-TrueBlue

The electronic newsletter e-TrueBlue is sent every Friday to Alumni Association members. On the last Friday of each month, e-TrueBlue also contains region-specific content promoting events and programs by local alumni clubs. Regional Alumni Association and University events may be included as well. The regional e-TrueBlue does not look different than the regular version, other than that it includes regional content.

- Each club can submit up to six event or non-event items each month.
- Items are submitted online at https://alumni.umich.edu/regional_etb.
- Any club officer with a username may submit text. Only the person who submitted the copy may edit or delete the copy.
- Submissions are due by midnight nine days prior to publication. For example, if the regional e-TrueBlue is being published on Friday, January 25, submissions are due by midnight on Wednesday, January 16. Clubs can make submissions at any point during the month. Items can also be submitted months in advance of publication.
- Clubs who do not submit items will still be listed with a link to the club's Web site.
- Additional information on regional e-TrueBlue can be found on the Club Leaders Web site.
- A reminder of the deadline is sent to the club president and any contributing officers. Please inform regional relations of any additional club leaders that should receive this email.

Producing a Supplemental Mailing

The Alumni Association will produce one postcard or tri-fold mailer (metro clubs are allocated three mailings) that can be used by clubs to communicate and connect with Alumni Association members in their area. The supplemental mailing may be used for promoting club events, soliciting scholarship funds, or as a newsletter. The goal of the supplemental mailing program is to allow all clubs to be able to communicate more effectively with their members. Templates of the flier and postcard can be seen on the Club Leaders Web site.

- Contact the regional relations coordinator when your club is ready to produce a supplemental mailing. The more advance notice we have, the better, but **you should allow at least six weeks from the time you submit text to the time you want the mailing to arrive in mailboxes.**
- Allow 3-14 days for processing by the US Postal Service.
- Submit text to the regional relations coordinator via email, attaching copy as a Microsoft Word document. Attach to the email any graphics or photos you want included in the mailing.
- Specify in your email whether you want to use a postcard or a tri-fold mailer.
- Be as specific as possible about ideas you have for layout. This is especially important with a tri-fold mailer. What text do you want inside versus on the outside fold? Do you want a “clip and send” registration form at the bottom?
- When you email the copy and the specifications, include the contact person for the mailing. We will email or fax a proof to that person for review.
- The Alumni Association will incur all costs for your supplemental mailing, including the printing and postage. Mailings will be sent by priority mail drop shipping. If you want to send your mailing first class, you may do so but keep in mind that the club will be responsible for the difference in cost between priority and first class postage.

Finding a Club MAC Administrator

In order to access information in the Alumni Association's database about local alumni, it is necessary for your club to appoint a MAC (Michigan Alumni Connections) administrator. The administrator can then run queries for alumni postal or email addresses. While this is not a difficult job and is certainly one that most volunteers can do comfortably, we do have some suggestions for finding an ideal MAC administrator. If possible, look for a volunteer who meets the following qualifications:

- Access to a PC with a high-speed connection (DSL, cable or Internet), not a Mac operating system
- Experience downloading information
- Experience using databases and Microsoft Excel

Once you have identified a MAC administrator, ask the volunteer to follow the steps below to gain access to the database:

- Send their name and email address to the regional relations coordinator.
- The volunteer must read and sign the MAC administrator data access and compliance documents. In addition, the documents must be read and signed by the club President. These documents are available from the regional relations coordinator and are also accessible from the Club Leaders Web site at <http://clubleaders.umclubs.com/index.php?page=mac-information>. Upon receipt of the signed access and compliance documents, access will be granted and instructions for using the database will be sent to the MAC Administrator.

Finding a Club Webmaster

We encourage all clubs to maintain a Web site through the Alumni Association. If your club does not have a Web site, contact the regional relations coordinator.

To be a webmaster for your club, you need the login and password. If you forget your login and password, contact the regional relations coordinator. Your club may have multiple webmasters, but remember that webmasters have the ability to add and delete text from your club's Web site.

Knowledge of HTML is not required, but is helpful. CMS Made Simple, the software we use for club Web sites, is compatible with Internet Explorer 6.0 or higher (5.2 or higher for Macintosh computers).

Instructions for updating your Web site are available on the Club Leaders Web site at <http://clubleaders.umclubs.com/uploads/NewWebInstructions.pdf>.

Using the AAUM Event Calendar

The event calendar on the AAUM Web site contains Alumni Association and club events that are happening all over the country. You can access the event calendar from your own Web site or by clicking on "Event Calendar" on the left sidebar of the AAUM home page. To submit an event to the calendar, you will need your U-M unickname and password. To edit an existing event, click on the Edit/Delete Events tab in the Event Calendar. Any changes/deletions must go through the approval process and be put online within 48 hours.

Best Practices: Being First and Best for All Alumni

Our 60-plus regional alumni clubs are an important connection between the Alumni Association and our alumni across the United States. To help regional clubs reach alumni in their area as effectively as possible, we developed this set of “best practices” based on input from clubs across the country. We hope that these examples will help describe what a model alumni club should look like and give you ideas for ways to improve upon your current club structure and activities. Each of the following areas is important in producing a club that is “first and best for all alumni.”



Club Mission Statement and Bylaws

Create a mission statement that is known among active members and publicized to all other area alumni. It will help draw participants who share the same goals. Develop a strategic plan that details how the group can work toward its mission and will allow a club to measure its progress and give club leaders a clear understanding of what is expected of them.

Ideas for making this happen

- Keep the mission statement simple. It should be something that club leaders can quickly and easily talk about with people who want to learn more about the club.
- Post the club’s mission statement on its Web site.
- Include the club’s mission statement on literature sent to members and prospective members.
- Regularly evaluate where the club is in relation to its strategic plan for carrying out the mission.
- Create club bylaws that incorporate the mission statement along with an outline of the club’s officer structure so that each officer understands his or her responsibility for carrying out the club’s mission.

How we can help

- Talk with the regional relations staff about alumni in your area, your club’s location, the interests of your board and your club’s history.
- Ask the regional relations staff to share samples of other clubs’ bylaws and to review a draft of yours.

How other clubs have made this happen

The U of M Club of Orange County and the U of M Club of Boston state the purpose of their organizations at the beginning of their bylaws, outlining goals that define their interaction with the University, alumni, students and the community.



Club Events

Host a diverse calendar of events that appeal to a wide range of members (age, life stage, gender, race/ethnicity, income/occupation, etc.) to offer alumni and friends a Michigan experience that they cannot get elsewhere.

Ideas for making this happen

Provide events that will offer people fellowship, personal enrichment and new opportunities to use Michigan connections. Such opportunities could exist in the following areas:

- Continuing education event
- Community service event
- Cultural event
- Family-oriented event
- Career-oriented event
- Young alumni event
- Athletic event (not just football)
- Welcome for members new to your area

How we can help

- Provide a certificate of the club's tax-exempt status
- Provide proof of the club's insurance coverage under the Alumni Association's policy
- Serve as a sounding board for your club's ideas and offer things to consider when planning an agenda, a venue, a time for an event, etc.
- Provide name tags and balloons
- Notify clubs when we hear of U-M personnel who will be traveling to their area

How other clubs have made this happen



Continuing education events

- Establish a monthly book club for your members.
 - Clubs that have done this: Silicon Valley, Twin Cities
- Attend the book signing of a U-M graduate, have a private reception for the author after the book signing.
 - Clubs that have done this: Boston; Chicago; Phoenix, Washington, DC
- Tour local museums that are sponsoring a discussion and exhibit on culture or religion.
 - Clubs that have done this: Delaware, Flint, Milwaukee



Community service events

- Support a local public television station's fund drive.
 - Clubs that have done this: New Hampshire, Michiana, Tucson
- Participate in a Red Cross Blood Drive.
 - Clubs that have done this: Hillsdale County, Los Angeles
- Participate in a local walk or run to support cancer or diabetes research.
 - Clubs that have done this: Chicago, Tampa, Bay City, Northville, Palm Beaches
- Adopt a local highway.
 - Clubs that have done this: Delaware, Manistee
- Assist at a local community food bank.
 - Clubs that have done this: Flint, Denver, Sun Cities
- Assist a local elderly, low-income home restoration project such as Habitat for Humanity or ElderHomes.
 - Clubs that have done this: Richmond, Central Ohio, Dallas, Charlotte
- Participate in a community cleanup day.
 - Clubs that have done this: Atlanta, Golden Gate, San Diego, Tampa
- Prepare breakfast for families at a local Ronald McDonald House.
 - Clubs that have done this: Milwaukee



Cultural events

- Support local U-M artists by having an art show displaying their work.
 - Clubs that have done this: Chicago
- Attend a theater production and have an afterglow or backstage tour with members of the cast.
 - Clubs that have done this: Downriver, Northville, San Diego
- Take advantage of numerous cultural events in the area by having a "culture series".
 - Clubs that have done this: New York
- Host a "gallery hop" and visit local art galleries or museums.
 - Clubs that have done this: Central Ohio, New Hampshire
- Visit a local museum that is having a special exhibit.
 - Clubs that have done this: Delaware, Seattle, Milwaukee
- Host a concert with the University of Michigan Men's or Women's Glee Club.
 - Clubs that have done this: Los Angeles, Manistee, Grand Traverse, Dayton



Family-oriented events

- Visit a local zoo and have a picnic on the grounds.
 - Clubs that have done this: Denver, Downriver, Twin Cities
- Attend a major or minor league sporting event with pre or post-game children's activities
 - Clubs that have done this: Detroit, Delaware, Washington DC, New Hampshire, York
- Visit an apple cider mill or attend a fall harvest festival
 - Clubs that have done this: Grand Rapids, Northville
- Host a family bowling outing.
 - Clubs that have done this: Fairfield County, Twin Cities
- Attend a family show like the Nutcracker, Disney on Ice, or Thomas the Tank Engine
 - Clubs that have done this: Downriver, Detroit



Career-oriented events

- Have career networking events, perhaps jointly with Ross School of Business clubs or local alumni clubs.
 - Clubs that have done this: Chicago, New York, Washington, DC, Los Angeles, Charlotte
- Host a career-oriented seminar with a career expert or executive.
 - Clubs that have done this: Detroit, Twin Cities



Young alumni events

- Host happy hours or happy hours.
 - Clubs that have done this: Downriver, Grand Rapids, Northville, Washington, DC
- Host a euchre tournament and rotate tables during the evening so participants get a chance to meet everyone.
 - Clubs that have done this: Dallas, San Diego, Triangle Area (MTAC)
- Have a singles table at a dinner dance or other social event.
 - Clubs that have done this: Orange County
- Participate in a local run or race.
 - Clubs that have done this: Chicago



Athletic events

- Create a softball or other athletic team made up of your club members and families.
 - Clubs that have done this: Washington, DC, Boston, Orange County
- Purchase tickets to a local minor or major league baseball game for your club members. See if your club president can throw out the first pitch or have your club's name put on the scoreboard.
 - Clubs that have done this: Golden Gate, Northern New Jersey, Seattle, Silicon Valley
- Plan a ski trip for club members.
 - Clubs that have done this: Denver, Fairfield County, Los Angeles, San Diego
- Plan a bus trip to a football away game.
 - Clubs that have done this: Detroit, Flint, Grand Rapids
- Host a golf outing.
 - Clubs that have done this: Detroit, Grand Rapids, Charlotte, Lansing, Tuscon
- Host a club bowling outing.
 - Clubs that have done this: Fairfield County, Twin Cities, Cleveland, Richmond



Welcome for new members

- Create a "Welcome Wolverine" packet to distribute to alumni who are new to the area.
 - Clubs that have done this: Chicago, Manistee
- Host a September welcome event for recent grads and other alumni who are new to the area.
 - Clubs that have done this: Boston, Twin Cities, Grand Rapids, Golden Gate, Seattle
- Introduce newcomers at club events and assign several people to make sure they feel welcome.
 - Clubs that have done this: Los Angeles



Collaboration

Providing assistance to or collaborating with other organizations in a club's area offers additional fellowship and networking opportunities and diversifies the club's programming.

Whom you can collaborate with

- Other U-M alumni clubs
- U-M alumni affiliate groups such as the African American Alumni Council, the U-M Entertainment Coalition
- Other U-M organizations (school/college or student-related organizations; e.g., the Ross School of Business clubs often co-host events with the local alumni clubs (www.bus.umich.edu/AlumniCommunity/AlumniClubs/))
- Alumni clubs from other Big Ten schools
- Other nonprofits/community service organizations

How we can help

- Provide contact information for other U-M alumni clubs and U-M Business School club leaders in your area.
- Coordinate a supplemental mailing for a joint club event.
- Provide information about Big Ten alumni relations staff.
- Introduce leadership to regional development staff.

How other clubs have made this happen

- Plan a ski trip with other U-M clubs.
 - Clubs that have done this: Los Angeles, Orange County, San Diego
- Plan an annual blood drive with an alumni group from another university.
 - Clubs that have done this: Hillsdale County, San Diego
- Plan/co-host/promote an event with an affiliate group.
 - Clubs that have done this: Los Angeles, New York
- Host a tailgate with alumni clubs from another university.
 - Clubs that have done this: Fort Wayne
- Co-host an event with the local U-M Business School club.
 - Clubs that have done this: St. Louis, Twin Cities, Washington, DC
- Host a U-M student group traveling to your area such as Alternative Spring Break or the Glee Club.
 - Clubs that have done this: Detroit, St. Louis, Philadelphia, Twin Cities, Michiana
- Take advantage of University faculty and personnel who may be traveling to your area for development purposes or to attend a conference.
 - Clubs that have done this: Seattle, Grand Rapids, Atlanta, Phoenix

- Participate in local Big Ten alumni activities.
 - Clubs that have done this: Charlotte, Orange County, New York
- Host a joint holiday party with other nearby clubs.
 - Clubs that have done this: Richmond, Tidewater



Leadership Succession

Involving new members in the planning and implementation of a club activity encourages and prepares them to later assume leadership of the activity.

Ideas for making this happen

- Identify opportunities for volunteering
- Start club members in small roles, such as asking them to coordinate an event or an aspect of an event such as publicity
- Ask people to get involved—don't assume they will voluntarily ask for the responsibility
- Have a succession structure outlined in your club's bylaws that includes term limits
- Think about who would make a good future officer and cultivate that relationship—don't wait until the week before the board elections to look for candidates
- Divide responsibilities up among a greater number of people, rather than giving a few people greater responsibilities
- Post available volunteer opportunities on your Web site and in regional e-TrueBlue

How we can help

- Teach your club's MAC administrator how to query MAC to target emails to alumni of certain ages or other demographics
- Provide model bylaws for use in preparing your own
- Review drafts of your club's bylaws and offer suggestions
- Work with your club to identify possible new leaders
- Provide position descriptions for officers, board members and committee chairpersons

How other clubs have made this happen

The U of M Club of Grand Rapids has a board of directors and an advisory board. The advisory board consists of past club presidents and newer club members who want to become more involved but might not have the time or experience necessary to serve as full board members. Serving on the advisory board gives these members a chance to provide meaningful and needed assistance on the club's various projects—and allows current board members to determine who might be ready to step up as an officer.

The U of M Club of Greater Chicago has a very detailed plan for leadership succession in its bylaws. There are 15 directors and eight officers. Director terms are three years and have varying expiration dates, which ensure that two-thirds of the board will remain constant and one-third will change in any given year. The club has incorporated term limits of six years (two renewable terms).

Officer terms are one year and the president and vice-president are limited to two consecutive terms.

The U of M Club of Manistee enlists future leaders by offering members opportunities to participate in popular, high-profile activities such as awarding scholarships and speaking at student receptions.

The president of the U of M Club of San Diego hosts an annual barbecue to thank the board for its hard work.



Scholarship Fundraising

Provide financial support for new and returning students in your club's area to ensure a geographically and culturally diverse student population at the University of Michigan.

Ideas for making this happen

- Establish and maintain a scholarship fund for students within your club area
- Contact high school guidance counselors or teachers in high schools within your club area and tell them about your scholarship and its requirements
- Use your club Web site to:
 - Share information about the scholarship (include application, timeline for applying, requirements, contact information, etc.)
 - Include "testimonials" from past recipients and past donors
 - Provide contact information for donations
- Maintain contact with current students at U-M from your club's area and past scholarship recipients to use for phone-a-thons and scholarship fund-raising events
- Print and mail an annual solicitation appeal to all area alumni. Tie in the written appeal with a fundraising event.
- Conduct a "phone-a-thon" or "calling party" to solicit funds from area alumni

How we can help

- Work with Denise D'Allura, AAUM's director for development, to create a regional scholarship fundraising goal and multi-faceted master plan for regional fundraising.
- Provide the scholarship video "Michigan Spirit: Think of the Possibilities" for use at club fundraising events.
- Provide at cost your club with footballs, basketballs and hockey pucks autographed by coaches to be raffled for the scholarship fund.
- Provide your club with lists of current students from your area each fall and spring. Use these lists to contact students to announce your scholarship and encourage them to apply.
- Provide contact information for the Office of Financial Aid, the Office of Undergraduate Admissions and other student services offices that could be of assistance.

How other clubs have made this happen

The clubs in Greater Detroit and Toledo have each created a development position on their boards to raise funds for scholarships. One tool used by both clubs is a scholarship appeal letter designed by the Alumni Association through the supplemental mailing program.

The U of M Club of Downriver raises money for its scholarship fund by having a “Beat Ohio State Bust” fundraiser during the Ohio State football-watching party. The club sells “M” hammers, painted yellow and blue, with decals and former players’ signatures to raise money for scholarships. Participants can try out their new hammers by crushing buckeye nuts.

The U of M Club of the Triangle Area (MTAC) has an annual online auction to raise money for its scholarship.



Student Recruitment

Engage in recruitment activities for prospective and newly admitted students in your club’s area to ensure a geographically and culturally diverse student population at the University of Michigan.

Ideas for making this happen

- Participate in the Alumni Student Recruitment program. Make sure all club members interested in recruiting are registered members of the ASR program.
- Act as a resource for prospective students and their parents, register with ASR to assist with college fairs and high school visits, host an admitted student reception (before the May 1 enrollment deposit deadline, invite enrolled students to a summer send-off reception).
- Contact high school guidance counselors or teachers in high schools within your club area. Take the opportunity to share with them information regarding your club scholarship (if applicable).
- Maintain contact with current students at U-M from your club’s area. Promote them as resources for prospective students.

How we can help

- To encourage collaboration and communication, provide your club with the names of alumni from your area who participate in the Alumni Student Recruitment program.
- Provide your club with lists of current students from your area each fall and each spring. Invite them to your summer send-off parties or recruitment events.
- Provide your club with a final list of matriculated (enrolled) students from you area. Request your list after May 1.
- Provide registered club members of the Alumni Student Recruitment program with training materials, giveaways and up-to-date information via e-TrueBlue: Inside Recruitment.
- Provide contact information for the Office of Financial Aid, the Office of Undergraduate Admissions and other student services offices that could be of assistance.
- Provide a Web site dedicated to student recruitment and ASR activities.

How other clubs have made this happen

The U of M Club of Greater Lansing had a group of members call each admitted student from its area to offer congratulations and ask the students if they had any questions. The club followed this up with a reception for students and their parents.

The U of M Club of Manistee hosts a student send-off at which it presents each student with a “survival kit” consisting of prepaid postcards and calling cards, email addresses of other area students at the University and a variety of Alumni Association gift items.

The U of M Club of Richmond provides final exam care packages to area students.

The U of M Club of Seattle puts together a list of students from the area that it gives to each student so that they can keep in touch while on campus. It also puts together a list of parents' contact information so that parents can stay in touch, too.

The U of M Club of Grand Rapids hosts an admitted student reception and a summer send-off barbecue each year. The reception provides information regarding housing, financial aid and other University programs for students who have been admitted to the incoming freshman class. The barbecue is an informal gathering to which all of the area's admitted students are invited in August, just before classes resume. This is a great time for the students to ask any last-minute questions and to connect with other students from the area so that they might have a friendly face on campus.

The U of M Club of Los Angeles has created a slide-show presentation to give prospective and admitted students the chance to preview Ann Arbor and the University before they head off to begin their first year at Michigan.



Public Relations and Promotion

It is important that all Michigan alumni in your area know how to contact you so that you can either help them or direct them to us. This serves to increase the visibility of the University, the Alumni Association and your club. Since all Alumni Association members are members of the local club, it is important to notify them of club activities and news.

Ideas for making this happen

- Establish and maintain a club Web page with the following elements:
 - Board/leadership contact information
 - Club mission
 - Current event information
 - Archived event information
 - Club calendar
 - Information about membership with link to www.umalumni.com
 - Detailed scholarship information
 - Local and U-M Links
- Use MAC to obtain mailing and email addresses for area members
- Contact members one to two times a month via any means available
- Make monthly submissions to regional e-TrueBlue
- Use AAUM-sponsored supplemental mailings
- Contact newcomers on a monthly basis, including personalized initial contact with members who are new to the area, club Web site address, local contact with email and phone number, next event information, etc.
- Maintain regular contact with regional relations staff
- Send post-event reports to regional relations staff
- Submit an annual report within the designated time deadline
- Notify AAUM staff of changes in leadership positions
- Read and respond to e-TrueBlue: Club Leader action items as requested

How we can help

- Set up and provide technical support for a listserv for your club
- Produce a supplemental postcard or tri-fold flier mailing for your club
- Assist with the design of a club logo
- Provide technical support for use of club Web site, club events calendar and regional e-TrueBlue
- Provide technical support for use of MAC
- Assist with the creation of club business cards
- Advise you about how to best use your club's column in e-TrueBlue
- Provide items such as banners and tablecloths for your club

How other clubs have made this happen

The U of M Club of Gaylord has a U of M Club of Gaylord logo as part of the service club sign at the entrance to the city.

The U of M Club of Delaware downloads members' email addresses from MAC to send out a monthly electronic newsletter or e-zine. It includes information about upcoming club events, University and Association news and profiles of members.

The U of M Club of Manistee announces club events in the local newspaper and in public service announcements on the local radio station. Most events are followed up with a report of the event and a picture in the newspaper.

The clubs of Northern New Jersey and Philadelphia have spearheaded campaigns in their respective states to have a University of Michigan state license plate. The U of M Club of Northern New Jersey sent a mailing to all alumni and students in the state, and the U of M Club of Philadelphia sent an email to all alumni in the state of Pennsylvania. Both clubs also use their Web sites to advertise the license plates.

The U of M Club of Washington, DC, has developed a friendly, informative response to email inquiries it receives. Instead of just providing contact information or a link to its Web site, this email from the club president details upcoming activities and welcomes people to DC and to the club.

The U of M Club of Denver created magnets with its club logo and contact information, along with its slogan "Your Ann Arbor Oasis in Colorado."

The U of M Club of Los Angeles is one of many clubs that have created business cards that board members can carry in their wallets and hand out to prospective members that they encounter. The U of M Club of New York uses football schedules as business cards by placing a sticker with the club's Web site address on the bottom of each.

The U of M Club of New York is one of many clubs that has a club photo album as part of its Web site. Members enjoy being able to see themselves on the Web and prospective members like to see pictures of their fellow alumni having fun. Other clubs, including the U of M Club of Golden Gate, have a club scrapbook/photo album that they carry to club events so that new members can thumb through and see all the activities the club does.

Several clubs summarize past events on their club Web sites. This gives potential members the opportunity to read about the club's recent activities and shows the level of activity and diversity of programming that the club sustains, even if the club's immediate upcoming calendar of events is a bit sparse.

Many clubs are using email addresses in MAC to contact members on a regular basis and inform them about upcoming events and club activities.

The U of M Club of Michiana gains great promotion as part of its participation in a local PBS station fund drive. In exchange for volunteering, the club is allowed to hang a U of M Club of Michiana banner, which can be seen by everyone watching TV. During breaks, hosts ask volunteers questions about the club and its activities.

The U of M Club of Golden Gate is one of many clubs that uses the club events calendar on www.umalumni.com to promote events. This is a great promotion tool because not only does it appear on the club's Web site, it appears on the Alumni Association's Web site, too.



Membership

As a membership-based organization, it is important that we provide value to members and educate nonmembers about the benefits of membership.

Ideas for making this happen

- Have club leaders who are knowledgeable about membership in the Alumni Association (benefits, how to sign-up, the cost, etc.) serve as a resource to members and promote the Association to nonmembers.
- Consider variety in the club's programming and methods of communication in order to engage new and different groups of alumni.
- Provide AAUM membership materials to participants at events.
- Send out communication pieces that include the Alumni Association's logo and contact information.
- Offer discounted pricing at club events for AAUM members.

How we can help

- Provide you with membership brochures
- Provide you with a member benefit tip sheet for display at events
- Include explanations of member benefits in e-TrueBlue: Club Leader and other communications

How other clubs have made this happen

The U of M Club of Greater Chicago and the U of M Club of Downriver have a statement on the front page of their Web site reminding visitors that if they are members of the Alumni Association, then they are automatically members of the local club.

The U of M Club of Greater Detroit has a link on its Web site to the Alumni Association's membership application.

The U of M Club of Northville includes an AAUM membership brochure in its bag of goodies that it gives to all students and parents that attend their send-off picnic.

The U of M Club of New York has an annual fall open house to promote the club and its activities to new members and to encourage new and old members to assume leadership positions. They also have a membership table at all events, especially football-watching parties, with AAUM membership brochures, information sheets about upcoming events and board members ready to answer questions.

The president of the U of M Club of Orange County writes a personal note after an event to each newcomer who attended (or to someone who attended but hadn't previously been active in the club) to thank him or her for coming.

Financial Basics: Handling Funds, Taxes and Insurance

These are the areas most often asked about by club leaders. Regional relations staff and VP/CFO Jerry Sigler are available for general discussion of these matters with club officers. We recommend that clubs consult with their own legal, insurance and accounting professionals to address specific club business issues. You also may wish to consult www.nonprofitbasics.org.

Club finances

1. Budgeting

Clubs should have a treasurer who makes regular reports to the board. We recommend that you prepare a general budget each year and a budget for each significant club event or activity. At least quarterly, clubs should prepare some type of financial statement to show its income, expenses and available funds.

2. Financial Resources

Usually, a club has two types of financial resources: operating funds and scholarship funds.

Operating Funds

Operating funds for most clubs come primarily from AAUM funding. They are used for club mailings, meetings, deposits and other expenses in operating a club.

Keep operating funds in a bank account under the club's own Taxpayer Identification Number (TIN). Use federal tax form SS-4 to obtain a taxpayer ID number. The form can be found at www.irs.gov/pub/irs-fill/fss4.pdf. Obtaining a taxpayer ID number has no effect on the club's tax status.

Club funds and individual club officer funds should never be co-mingled. Keeping them separate reduces the potential for liability of individual members and provides a mechanism for clearly tracking club income and expenses.

Set up club checking and savings (if appropriate) accounts with two authorized check signers. Require two signatures for larger checks (most clubs have this threshold between \$100 to \$500). Officers should include their titles when signing checks to reduce personal liability.

Bank accounts should be reconciled promptly, and the officer reviewing the statements should share a copy of them with the other signer and/or another officer. This is another good control mechanism and also allows for early detection of problems.

Scholarship Funds

Scholarship funds are those designated for student support. They should be maintained separately from operating funds, either in a separate bank account or with the University (see Page 59). All of the other guidance provided above regarding operating funds applies to scholarship funds.

Taxes and deductibility of donations

Tax-Exempt Status

1. What is it?

To be tax-exempt, an organization must be organized and operated exclusively for one or more of the purposes set forth in Section 501(c)(3) of the Internal Revenue Code and none of the earnings of the organization may inure to any private shareholder or individual. In addition, it may not attempt to influence legislation as a substantial part of its activities and it may not participate at all in campaign activity for or against political candidates. Complete exemption requirements can be found at www.irs.gov/charities/article/0,,id=96099,00.html.

There are several 501(c) recognition categories. Section 501(c)(3) status is one that allows an organization to receive contributions that are tax-deductible to the donor. Clubs likely can qualify as tax-exempt under section 501(c)(7) as a social club, but all that means is that the club doesn't have to pay taxes. It does not mean it can receive tax-deductible gifts.

2. How do you get tax-exempt status?

Affiliated clubs can take advantage of AAUM's 501(c)(3) tax-exempt status when circumstances warrant. If a club wishes to apply for its own exemption under section 501(c)(3), it should file IRS Form 1023, which can be found at www.irs.gov/pub/irs-pdf/f1023.pdf. However, it will be necessary to prove that the club is "organized and operated exclusively" for educational purposes. Typically, tax-exempt status is useful when a club handles large sums on an annual and ongoing basis because it allows gifts to the club (as opposed to AAUM or the University) to be tax-deductible for the giver. Of course, it also requires that clubs keep detailed records, issue receipts for contributor income tax purposes and file annual federal income tax returns. As there is a cost to file for federal tax-exempt status (\$150), and because some clubs have had their requests turned down, we do not encourage clubs to make such a request without careful research by their professional advisors.

3. When are donations tax deductible?

Unless a club has secured its own 501(c)(3) status, all donations to club scholarship funds must be made to "The University of Michigan" in order to be deductible for the donor. Donors should designate the club scholarship name or account number on the memo line. Clubs should forward individual checks to the University's Gift Processing Office, where a gift receipt is prepared and sent to each donor. It is not acceptable for a club to collect from various donors and send just one club check to AAUM or the University.

Arrangements can be made for a similar process if the club wishes to solicit tax-deductible gifts for its Operating Funds. Arrangements can also be made to accept credit card gifts.

If an individual receives anything in return for her/his scholarship contribution—a meal or tickets to an event, for example—the value of the contribution must be reduced by the market value of the item received by the donor. For example, if a donor gives \$50 in exchange for a \$20 dinner, the donor may deduct \$30. An exception to this rule is allowed if the item provided is "insubstantial," which is defined by the IRS as the lesser of 2 percent of the donation or \$83, or if it is a "low cost article" with a cost of \$8.30 or less.

4. Filing tax returns

Michigan law does not require clubs to file an annual state income tax return, unless the club offers goods for sale (see discussion of “unrelated business income” below). Laws in other states may differ and you should consult your professional advisors for the rules in your state.

All clubs earning unrelated business income of \$1,000 or more must file IRS Form 990T annually (www.irs.gov/pub/irs-fill/f990t.pdf). “Unrelated business income” is defined as income from a trade or business, regularly carried on, that is not substantially related to the performance by the organization of its exempt purpose or function (e.g., selling ads in a regularly published magazine). For more information, visit www.irs.gov/charities/article/0,,id=96104,00.html.

5. Unique Michigan tax issues

In Michigan, you must collect sales tax on items sold for fundraising purposes. Clubs conducting a single sale per year must file a concessionaire sales tax return with the tax collected. Clubs conducting two or more sales per year must get a sales tax license, report sales tax monthly or quarterly and pay the tax collected.

In Michigan, all incorporated groups must file a Michigan Annual Report (\$10 fee; Corporation and Securities Bureau Form 2000). (See discussion under “Insurance” regarding incorporation.)

In Michigan, clubs eligible to use AAUM’s tax-exempt status need not pay sales tax on purchases and vendor-provided services (such as meals in a country club). Show the proof of insurance and letter of affiliation, enclosed with the annual club allocation check, to vendors and merchants for a waiver of sales tax. If necessary, a copy of AAUM’s exemption letter can be provided.

Laws in other states may differ and you should consult your professional advisors for the rules in your state.

6. Raffles

In Michigan, all raffles require a license, detailed financial records of all activities and a financial report after the raffle. Laws in other states may differ and you should consult your professional advisors for the rules in your state.

Insurance

Extension of University coverage to clubs

The University's insurance extends to clubs that are recognized as affiliates of AAUM. The evidence of insurance document enclosed with the annual allocation check outlines general coverage, including director and officer ("D&O") coverage and is effective until such time as the University determines coverage is no longer applicable (such determination to be made annually) or until the club no longer meets the qualifications and requirements for recognition as an affiliate of AAUM.

Benefits from incorporating

Clubs are encouraged to incorporate under the laws of their own states. Doing so may limit the liability of a club's officers and directors. State laws providing liability protection to volunteer leaders vary widely but are worth investigating.

The national Volunteer Protection Act adds another layer of protection for volunteer leaders under certain conditions if they are a 501(c)(3) or 501(c)(6) organization or "any not-for-profit organization which is organized and conducted for public benefit and operated primarily for charitable, civic, educational, religious, welfare or health purposes." For more information, visit www.eriskcenter.org/erisk.htm?pid=17.

Appendix: Forms and Documents

Volunteer Sign-up Sheet



**ALUMNI ASSOCIATION
UNIVERSITY OF MICHIGAN**

Volunteer name:	Email:
Mailing address:	Telephone:
Year graduated and school/college:	Are you an AAUM member?

SKILLS (please circle anything applicable or interesting to you)

<u>TECHNOLOGY</u>	<u>Leadership Experience</u>	<u>Writing</u>	<u>Organizational</u>
Database/listserv	U-M student leader	e-TrueBlue/newsletter content	Event planning
Web site	Nonprofit group	Web site content	Other:
Graphic Design	Other:	Other:	
Other:			<u>Miscellaneous Skills</u>
			Financial
			Other:

LEADERSHIP ROLES

If you have an interest in a leadership role with the U of M Club of , which of the following roles would you be interested in? (please circle all that apply)

Club officer	Committee chairperson	General volunteer	Other, please specify:
Board member	Committee member	Day-of-event volunteer	

PROGRAMMING/EVENTS

Willing to work on events in these locations:

Willing to work on these types of programs/events: (please circle all that apply)

Community service	Happy hours	Student recruitment	Football-watching parties
Cultural events	Career/professional development	Scholarship fundraising	Other athletic activities
Family events		Scholarship admin.	Other:

AVAILABILITY

Preferred days of the week to meet: (please circle all that apply)

<i>Sunday</i>	<i>Monday</i>	<i>Tuesday</i>	<i>Wednesday</i>	<i>Thursday</i>	<i>Friday</i>	<i>Saturday</i>
morning	morning	morning	morning	morning	morning	morning
afternoon	afternoon	afternoon	afternoon	afternoon	afternoon	afternoon
evening	evening	evening	evening	evening	evening	evening

Thank you for your interest in volunteering with the _____ club. Please return this form to: [insert club contact info here]. A member of the club will be contacting you in the near future to discuss your volunteer interests.

EVENT PROPOSAL

Submitted by: _____
Telephone _____ (daytime) _____ (evening)
Mailing address _____
Email address _____

Event name: _____

Purpose: _____

Target audience: _____

Date: _____

Time: _____

Location/Venue: _____

Expected attendance: _____

Admission price: \$_____ AAUM members \$_____ Nonmembers

Projected Expenses:

Facilities/room rental charges	\$_____
Set-up charges/fees	\$_____
Rental equipment (includes audio-visual, tents, risers, tables, chairs, etc.)	\$_____
Food	\$_____
Beverages	\$_____
Bartender fees/gratuities	\$_____
Promotional materials (includes printing and mailing of invitations, signage, programs, tickets, flyers, etc.)	\$_____
Decorations	\$_____
Entertainment	\$_____
Transportation (includes buses, vans, parking, valets, gratuities for drivers, etc.)	\$_____
Miscellaneous (includes plaques, photos, speaker travel/expenses, and supplies, etc.)	\$_____

TOTAL EXPENSES: \$_____

Deposit check request:

Amount \$_____

Check payable to _____

Other alumni volunteers who will assist with the event:

1) _____	4) _____
2) _____	5) _____
3) _____	6) _____

Approved: _____ Yes _____ No

Club officer signature: _____ **Date:** _____

Position Descriptions for Officers, Board Members and Committee Chairpersons

Officer and Director Positions

Officers and directors are expected to be current dues paying member of the Alumni Association of the University of Michigan.

Executive Committee/Officers

The executive committee is comprised of all officers of the (*insert club name*). The responsibilities of this committee shall include but not be limited to the following:

- Set overall strategy for the (*insert club name*)
- Lead efforts to revise Articles of Association and bylaws as needed

President

The president's responsibilities include:

- Supervising and coordinating (*insert club name*) activities
- Calling and presiding over regular and special meetings of the board and the executive committee
- Ensuring the holding of the annual meeting as called for by the club's Articles of Association
- Ensuring the completion of the (*insert club name*) Annual Report for the AAUM (this responsibility is often listed as a responsibility of the vice president)
- Serving, if interested, as a member of any standing or ad hoc committee, with the right to vote
- Appointing, with a majority vote of the board, standing or ad hoc committees for the (*insert club name*) and their respective chairpersons
- Serving as principal liaison with the University, the Alumni Association and other organizations

Vice President

The vice president's responsibilities include:

- Presiding over the (*insert club name*) meetings in the absence of the president
- Chairing the nominating committee
- Ensuring that the term limits described in the (*insert club name*) bylaws are adhered to by the officers and directors of the board
- Serving as a resource for the chairs of the following committees: (list club committees here) and participating in associated activities as needed
- Assuming the duties of the president on an interim basis if the president is unable to complete his/her term

Additional responsibilities to consider for this position:

- Larger clubs sometimes have more than one vice president, each with different responsibilities related to chairing committees.

- Some clubs list completing the annual report for the AAUM as a responsibility of the vice president.
- Some club succession plans include adding the vice president, at the end of the current president's term, to the slate for incoming president.

Secretary

The secretary's responsibilities include:

- Giving notice of the (*insert club name*) board meetings
- Taking and distributing meeting minutes at board and special meetings
- Maintaining a permanent record of all (*insert club name*) proceedings
- Tallying votes from the board and general membership
- Maintaining and circulating the current Articles of Association and bylaws of the (*insert club name*)
- Taking attendance at (*insert club name*) board meetings

Additional responsibilities to consider for this position:

- Some clubs list completing the annual report for the AAUM as a responsibility of the secretary.
- Serving as a resource for the MAC database administrator, contributing editor(s) and Web site administrator and supervising annual elections are also duties that some club secretaries perform.

Treasurer

The treasurer's responsibilities include:

- Receiving all funds paid to the (*insert club name*)
- Disbursing money on properly authorized orders/invoices
- Maintaining the permanent record of all financial matters
- Preparing a Treasurer's Report on the status of the operating and scholarship funds for all meetings of the board, including the annual meeting
- Preparing a final report for the prior fiscal year and submitting such report to the board
- Transferring funds to the Office of Financial Aid of the U-M
- Transferring financial records to the current treasurer no later than the (*insert date*) board meeting
- Assisting in preparation of event-based budgets and related record keeping
- Serving as a resource for the director(s) of (1) scholarship awards and student relations and (2) fundraising, participating in associated activities as needed

Larger clubs that have their own 501(c)3 or 501(c)7 status often include these additional responsibilities in their treasurer's position description:

- Preparing and filing an annual tax return
- Chairing the investments or finance committee and overseeing its functions, including the appropriate investment of funds
- Preparing an annual budget with the assistance of the finance committee
- Overseeing risk management and insurance
- Maintaining the club's nonprofit tax status

Immediate Past President

Some clubs, but not all, have defined roles for the immediate past president, which includes his/her participation on the club's board. Some clubs define the immediate past president responsibilities to include serving as a member of the executive committee with voting privileges, while others define the role as serving in an advisory capacity to the club and participating with the board as needed.

Directors (a.k.a. Governors)

Directors' responsibilities include:

- Serving as liaisons among the (*insert club name*) leadership, the membership and the community at large
- Representing the diverse interests of the general membership
- Assisting the officers in the administration of the (*insert club name*) and in volunteer identification and recruitment
- Attending board members on a regular basis (club needs to define what "regular" means)
- Attending club events on a regular basis (club needs to define what "regular" means)
- Contributing to the work of at least one standing or ad hoc committee. (The club needs to define its standing committees. For example: Fundraising, membership, programs, scholarship awards and student relations, contributing editor, MAC administration, Web site administration and young alumni.) Many clubs require that a director actually serve as chairperson for a committee and give a committee report at board meetings. The chair(s) for each committee is responsible for submitting financial goals, including budgets, for the committee in writing to the treasurer throughout each fiscal year.

Committee Descriptions

Marketing and Communications Committee

Members of this committee include the MAC database administrator, Web site administrator and contributing editor. The responsibilities of the marketing and communications committee include coordinating the communication and marketing strategies for the (*insert club name*) and assisting other committees with creation and execution of fliers, postcards and other mailers.

Web site Administrator responsibilities include:

- Managing and updating the content of the Web site as requested by the board and the contributing editor

Contributing Editor responsibilities include:

- Writing copy for the (*insert club name*) Web site, listserv messages and regional e-TrueBlue
- Submitting (*insert club name*) monthly submissions to regional e-TrueBlue
- Submitting information for the AAUM Web site event calendar

- Writing copy for and coordinating supplemental and other AAUM sponsored paper mailings

Michigan Alumni Connections (MAC) Database Administrator responsibilities include:

- Updating alumni information for the (insert club name) on a regular basis
- Running queries to download alumni information
- Updating and maintaining the club's listserv

Membership Committee

The responsibilities of the programming committee include:

- Creating and executing strategies to welcome new graduates moving to the (*insert club name*) area
- Planning, with the programming committee, an annual welcoming event each August or September for new alumni
- Creating and executing strategies to welcome relocating alumni to (*insert club name*) area
- Creating strategies, with the Alumni Association, to market the value proposition of membership to current members
- Leading board recruitment efforts to identify volunteers to serve on committees and to join the board
- Insuring that at least one representative on the committee attends events that are planned by the committee
- Insuring that AAUM membership materials and volunteer signup sheets are available at (*insert club name*) events

Nominating Committee

The responsibilities of the nominating committee include:

- Soliciting nominees for officer and director positions by canvassing current board members and collaborating with the marketing and communications committee to develop a strategy to make opportunities for leadership known to the general membership
- Presenting a slate of nominees for officer and director positions to the board of directors

Programming Committee

The responsibilities of the programming committee include:

- Leading the (*insert club name*) programs planning meeting, scheduled annually in (*insert month*), where a diverse calendar of events for the fiscal year (July 1–June 30) are identified
- Presenting the proposed calendar of events to the board for approval at the (*insert month*) board meeting
- Planning, arranging and coordinating events for the (*insert club name*)
- Establishing financial and operational objectives for (*insert club name*) events
- Determining subcommittees and electing subcommittee chairs that best fulfill the annual programming goals of the (*insert club name*)

- Ensuring that the communications committee is informed of all events with sufficient time to make sure members are notified of events and encouraged to attend
- Collecting informal feedback from event attendees and informing the board of “lessons learned” from each event
- Insuring that at least one representative on the committee attends events that are planned by the committee

Scholarship & Student Relations Committee

The responsibilities of the scholarship and student relations committee include:

- Assisting in the recruiting of students for the University of Michigan
- Attending college nights at local high schools
- Recruiting volunteers for the Alumni Association's adopt-a-school program
- Contacting high school guidance counselors within the (*insert club name*) area
- Developing and coordinating a student send-off reception for newly admitted students, information sessions and a conversion party for accepted students
- Disseminating scholarship information and materials to U-M students in the (*insert club name*)
- Awarding scholarships to students from the (*insert club name*) area
- Serving as liaison to the U-M Office of Financial Aid

Young Alumni Committee

The responsibilities of the Young Alumni Committee include:

- Advising the board when necessary to amend the definition of “young alumni,” which is currently defined by year of graduation
- Serving as the single point of contact for initiating and responding to young alumni communications
- Assisting the programming committee in developing programs and events focused on engaging young alumni in (*insert club name*), including identifying young alumni to serve as volunteers for young alumni events and events involving local high school students

Miscellaneous

Some clubs have the following positions:

- **Honorary Director**

A designation voted on by the majority of the board of directors to recognize individuals who have served the club and earned lifetime status. Honorary directors are not considered to be voting members of the board of directors.

- **Historian**

A club member who takes photographs at club-related events, maintains a photo album for the club and maintains the club’s history.