

WHEATON COLLEGE  
ALUMNAE/I ASSOCIATION  
2007-2008

CLASS OFFICERS' HANDBOOK

## TABLE OF CONTENTS

|   |       |
|---|-------|
| Welcome.....  | 3     |
| What does it mean to be a class officer?.....                             | 4     |
| President .....   | 5     |
| Vice President/Program Chair .....  | 6     |
| Class Notes Correspondent/Secretary .....                                 | 7     |
| Gift Chair .....  | 8     |
| Treasurer .....   | 9     |
| Nominating Committee .....  | 10    |
| Web master .....  | 10    |
| What can I expect from Wheaton? .....                                     | 11    |
| Class Support Contacts .....  | 12-13 |
| Class Officer Staff Liaisons for 2007-2008 .....                          | 14-15 |
| What is a mini-reunion? .....   | 16    |
| Appendix A: How do I open a bank account or obtain a Tax ID number? ..... | 17-20 |
| Appendix B: How do I create a class newsletter? .....                     | 21-22 |
| Appendix C: What do I need to know about the Annual Fund? .....           | 23-27 |
| Appendix D: How do I create or maintain my class Web site? .....          | 28-29 |
| Appendix E: How do I hold a conference call? .....                        | 30-31 |

# Welcome, Class Officers

On behalf of the Alumnae/i Association and the Office of Alumnae/i Relations and Annual Giving, thank you for volunteering for your class and for Wheaton. Classes are a vital part of the Wheaton Alumnae/i Association. As the chosen leaders of your classmates, the Alumnae/i Association and the college will look to you to help foster a sense of connection between your classmates and to encourage them to stay in contact with Wheaton. You will also be charged with educating your classmates about Wheaton today and with maintaining class spirit between reunion years. As you can see, being a class officer is a big job, but it can also be a lot of fun.

This Class Officers' Handbook is designed to answer any questions you may have regarding class officer responsibilities, event planning and communication with your classmates. A separate Reunion Handbook is available for class officers entering a reunion year. Please read this handbook carefully and contact your staff liaison (see page 14-15) with any questions or feedback.

The Alumnae/i Board of Directors and the Alumnae/i Relations and Annual Giving staff are ready to assist you in any way we can, from providing advice and expertise on class issues to supplying class lists and mailing labels. We are here to support you in all your class activities. Please continue to let us know how the Alumnae/i Association can serve you better.

Thank you for volunteering for Wheaton!



Monique Shire Slap '81  
President  
Alumnae/i Association



Heather Corbett '86  
Director of  
Alumnae/i Relations



Diane Robbins, P'09  
Director of  
Annual Giving

## **What does it mean to be a class officer?**

Being a class officer is both an honor and a lot of fun. Class officers enjoy keeping in touch with classmates, working with other volunteers and celebrating Wheaton. Class officers serve five year terms that run from Reunion to Reunion.

### **Class officer responsibilities:**

- Be the voice of your classmates to the Alumnae/i Association.
- Produce an annual fall newsletter (see Appendix B for details).
- Stay in touch with staff at Wheaton and the leadership of the Alumnae/i Association.
- Make a gift to the Wheaton Annual Fund that reflects your own resources and your commitment to Wheaton as a philanthropic priority.
- Join Annual Fund volunteers in seeking financial support for Wheaton's people and programs.
- Identify potential volunteer leaders among your classmates.
- Maintain enthusiasm and class spirit in the years between Reunions.
- Serve on the Reunion planning committee during your Reunion year.

### **Expectations of all class officers:**

- Provide active support to all class officers as they assume their responsibilities, including attending class gatherings and making an annual gift to the Annual Fund.
- Keep written records to be passed on to successors.
- Attend Alumnae/i Leadership Conference (ALC), held on campus each fall, where you will receive practical information and guidelines along with current news from Wheaton and the Alumnae/i Association. If you are unable to attend ALC weekend, appoint at least one representative who can attend and update absent officers.
- Communicate to your classmates news of class activities, as well as upcoming college plans and activities. This is done primarily through an annual class officers' newsletter, which is usually written at, or immediately following, ALC and is due to your staff contact by November 9.

Specific class officer job descriptions follow.

## **PRESIDENT**

The Class President provides leadership, support and encouragement to the officers and members of the class. The President is responsible for providing the class with a sense of direction and unity. S/he is responsible for the overall operation of class plans and projects and can appoint additional volunteers as needed.

### **Responsibilities**

1. Provide active support to all other officers as they assume their responsibilities. This includes, but is not limited to, contributing information for Class Notes, attending class gatherings and making a gift to Wheaton through the Annual Fund.
2. Plan class activities and communicate with other officers regularly to discuss class plans and to make certain that everyone is carrying out their duties.
3. In collaboration with other class officers, write at least one (1) class officers' newsletter a year to classmates, updating them about the college, the association and class activities. The Alumnae/i Relations and Annual Giving Office will print and mail up to two non-fundraising letters each year, including invitations for class activities.
4. Appoint a Nominating Chair and committee to select nominees for new class officers prior to Reunion.
5. Call and preside over all class and officers' meetings.
6. Submit to the Alumnae/i Relations Office copies of all class correspondence, including class officers' letters, invitation to mini-reunions, etc.
7. Become an informed advocate for Wheaton, one's class and the Annual Fund.

## **PROGRAM CHAIR (aka VICE PRESIDENT)**

The Program Chair/Vice President's primary responsibility is to serve as Program Chair for her/his class reunion. The calendar of activities for the VP/Program Chair changes dramatically during the year before a Reunion. The Reunion Handbook describes the special responsibilities in preparing for Reunion. Please contact the Alumnae/i Relations and Annual Giving Office if you would like to receive a copy of the Reunion Handbook in advance of your reunion year.

### **Responsibilities**

1. Provide active support to all other class officers as they assume their volunteer responsibilities. This includes, but is not limited to, contributing information for Class Notes, attending class gatherings, and making a gift to Wheaton through the Annual Fund.
2. Serve as Program Chair of your class Reunion.
3. Recruit a Reunion program committee approximately 12-15 months prior to Reunion.
4. Organize mini-reunions for classmates between Reunions. (See page 16 for more information about mini-reunions.)
5. Assist in writing the class officers' newsletter to classmates. The Alumnae/i Relations and Annual Giving Office will print/mail up to two non-fundraising letters each year, including invitations for class events.
6. Handle the duties of the President in her/his absence.
7. Become an informed advocate for Wheaton, one's class and the Annual Fund.

## CLASS NOTES CORRESPONDENT/SECRETARY

The individuality of each class and its sustained interest in Wheaton is shown through the writings of the Class Notes Correspondent/Secretary. Large classes may choose to elect multiple volunteers to share this responsibility.

### **Responsibilities**

- Provide active support to all other class officers as they undertake their volunteer responsibilities. This includes, but is not limited to, contributing information for Class Notes, attending class gatherings, and making a gift to Wheaton through the Annual Fund.
- Gather information for and write Class Notes for each issue of the *Wheaton Quarterly*. Special instructions for the preparation of Class Notes are provided to each class secretary by the Class Notes Editor of the *Wheaton Quarterly*. The Class Notes Editor also mails deadline reminders prior to each issue.
- Assist in writing the class officers' newsletter to classmates. The Alumnae/i Relations and Annual Giving Office will print/mail up to two non-fundraising letters each year, including invitations for class events.
- Keep a notebook that includes correspondence from the college and from classmates to serve as an historical record of class activities.
- Take minutes at class meetings.
- Become an informed advocate for Wheaton, one's class and the Annual Fund.

## **GIFT CHAIR**

Gift Chairs are vital to the success of the Wheaton College Annual Fund, which provides critical financial support to the college. Gift Chairs are part of a team of volunteers who help the college seek annual financial support. While their main job is to ask classmates to support Wheaton through gifts to the Annual Fund, the Gift Chairs are also involved in identifying potential volunteer leaders and leadership gift prospects, and in acting as an ongoing connection between the college and their classmates. Large classes should elect multiple volunteers to share this responsibility.

### **Responsibilities**

- Provide active support to all other class officers as they undertake their volunteer responsibilities. This includes attending class gatherings and ALC/Homecoming Weekend.
- Make a gift to Wheaton through the Annual Fund that reflects one's own resources and commitment to Wheaton as a philanthropic priority. This gift will serve as an example for classmates.
- If required, work with your staff liaison to actively recruit callers each fall to participate in volunteer calling. Non-Reunion classes will be called by Students in the Phonathon program in the fall.
- We strongly encourage class officer teams to write newsletters that include both class news and an Annual Fund appeal. Please write your own personal appeal to classmates. If your class doesn't write a newsletter, it is imperative that the Gift Chairs send a personal fall appeal.
- In the spring, contact classmates who are prior Annual Fund donors and those with outstanding pledges by mail, e-mail, and during the spring calling program. Recruit classmates to assist with those calls.
- See Appendix C, which contains details of Annual Fund goals and initiatives to prepare volunteers for telephone solicitations and fund appeal writing.

## TREASURER

The Treasurer's primary responsibilities are to collect class dues (either annually or in the year preceding a Reunion) that are used to fund specific class projects and to maintain the class bank account.

### Responsibilities

- Provide active support to all other class officers as they assume their volunteer responsibilities. This includes, but is not limited to, contributing information for Class Notes, attending class gatherings, and making a gift to Wheaton through the Annual Fund.
- Collect dues annually, or at a time agreed upon by the members of the class.
- The collection of dues is usually done by mail, often as part of the class officers' newsletter. Class dues are often used to defray the cost of class organized events during reunions, souvenirs given out at reunions, and mini-reunions. Class officers should clearly explain the purpose of the dues in their request to classmates.
- Maintain a class bank account and preserve the class financial records, if applicable. **(Classes who have already celebrated their 55<sup>th</sup> Reunion are no longer required to collect dues and maintain a treasury, except as needed in the year prior to Reunion.)**
- Assist in the writing of the class officers' newsletter to classmates.
- Become an informed advocate for Wheaton, one's class and the Annual Fund.

**It is possible for each class to obtain a Tax I.D. number from the Federal Government.**

Please refer to the guidelines in Appendix A, or call your staff contact for additional information about how to obtain the appropriate forms.

## OTHER CLASS OFFICERS

The following officers can be elected or appointed by the Class President in consultation with the other officers.

### NOMINATING CHAIR/COMMITTEE

New class officers are elected at each Reunion. In order to facilitate this process, class officers should appoint a Nominating Chair and/or Committee approximately 6-8 months prior to Reunion. This committee collects nominations from the class and can then either select a slate of candidates for election or draw up a ballot for voting during Reunion. Lists of classmates with past volunteer activity can be obtained from your staff contact to assist the committee. The Alumnae/i Association and the college staff can provide assistance in recruiting candidates.

#### Responsibilities

- Solicit nominations for all officer positions and either select a slate of officers or draw up a ballot to present at a class meeting during reunion. (Presenting a slate is often preferred because it ensures that each candidate is selected based on her/his abilities and willingness to serve.)
- Ensure that all candidates have been contacted and are willing to server as officers. Make sure candidates understand the importance of their roles to their classmates and to Wheaton, including the necessity of making an Annual Fund gift. (Copies of this handbook can be provided to the nominating committee and/or class officer candidates.)
- Work with the Alumnae/i Relations and Annual Giving staff to find a nominee(s) for Class Gift Chair(s).

### WEB MASTER

Wheaton currently hosts class Web pages on its server, which are accessible from Wheaton's alumnae/i pages. The class Web master works with other class officers to create and maintain the class Web site, frequently updating the content to keep the pages as current as possible. Melissa Nederostek, Assistant Director of Alumnae/i Relations and Annual Giving, can provide Web masters with training and ongoing support.

Class Web masters should have access to a computer and basic familiarity with the Internet (no special computer training or skills are needed; the pages are set up using templates that are as easy to use as a word processor). See Appendix D for more information about creating and maintaining a class Web site.

#### Responsibilities

- Maintain class Web pages, including updating content and gathering and submitting photographs. (Make sure to refresh content regularly to keep classmates visiting often.)
- Think about new ways to use your Web pages to engage classmates, recruit volunteers, solicit Annual Fund donations, advertise events, and more.

Check out the current Wheaton class Web pages for ideas: [www.wheatonma.edu/alum/class](http://www.wheatonma.edu/alum/class).

## What can I expect from Wheaton?

- Assistance and support from the Alumnae/i Relations and Annual Giving staff.
- A phone call, e-mail and /or personal visit from your staff contact(s) at the beginning of the academic year to discuss class goals for the year ahead, create a plan of action to achieve them and answer questions.
- An invitation to attend the training sessions and events of the Alumnae/i Leadership Conference (ALC) each fall.
- The Class Officers' Handbook, to answer questions and provide assistance in organizing and operating your class programs.
- Processing and postage costs for up to two (one ounce) mailings per year, (This includes class newsletters and event invitations.) Please give the staff at least 2-3 weeks to process all mailings.
- Class lists (paper or electronic) and computer labels of classmates as needed. **(Please note that all lists and labels that contain address, e-mail and telephone information of Wheaton graduates are to be used for Wheaton and class business only! Transfer or use of this information for other purposes is strictly prohibited and may result in removal from office.)**
- Assistance in recruiting class volunteers, as needed.
- Periodic phone calls and e-mails to answer questions, discuss upcoming projects, and check progress toward goals.
- In addition, Gift Chairs will receive confidential class giving reports.

## **Class Officer Staff Support**

### **Staff Liaisons:**

Each member of the Alumnae/i Relations & Annual Giving (ARAG) team is responsible for providing support to a specific number of class officer volunteer teams. Two staff liaisons – one from Alumnae/i Relations and the other from Annual Giving—will partner together to provide guidance, encouragement and support to non reunion class volunteer officers. Staff liaisons will serve as the class officers' primary contacts in the ARAG office.

### **Team Approach:**

The Annual Fund liaison will work with Gift Chairs to support the Annual Fund effort for each class, while the Alumnae/i Relations liaison will work with the other class officers to support non fund events and activities. This team approach is designed, in part, to mirror the team approach we want all class officers to take in their volunteer efforts for their class and for Wheaton.

*In most cases*, classes are now assigned in clusters or decades, and each staff liaison team will maintain a relationship with that particular decade, in order to provide continuity of support and build stronger relationships over many years.

### **Reunion Classes:**

Ryan Parker '01 and Heather Corbett '86 will support the program effort for reunion classes 1948-2006; the 50<sup>th</sup> Reunion Class is supported by Sharon Howard '87; and our most Senior reuniting alumnae are supported by Barbara Carnevale. Members of the Annual Fund staff will support the gift efforts of Reunion classes. Please refer to pages 13-15 for specific assignments.

# Office of Alumnae/i Relations and Annual Giving

## STAFF SUPPORT for CLASS OFFICERS

August 2007

The Office of Alumnae/i Relations and Annual Giving is designed to promote a strong, dynamic and active alumnae/i community in support of Wheaton. The staff below forms the Alumnae/i Relations and Annual Giving team. Each class officer team, including the class gift chair, has been assigned two staff support liaisons (see next page). Any questions about class matters should be directed to your assigned staff liaisons.

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# CLASS OFFICER STAFF SUPPORT

August 2007

| Class Year                  | Annual Giving Staff      | Alumnae/i Relations Staff |
|-----------------------------|--------------------------|---------------------------|
| 1925                        | Barbara Carnevale        |                           |
| 1927                        | Barbara Carnevale        |                           |
| 1934                        | Barabara Carnevale       |                           |
| 1936                        | Barabara Carnevale       |                           |
| 1937                        | Barbara Carnevale        |                           |
| <b>70<sup>th</sup> 1938</b> | <b>Barbara Carnevale</b> | <b>Ann Robinson</b>       |
| 1939                        | Barbara Carnevale        |                           |
| 1940                        | Barbara Carnevale        |                           |
| 1941                        | Barbara Carnevale        | Betty Polk                |
| 1942                        | Barbara Carnevale        | Betty Polk                |
| <b>65<sup>th</sup> 1943</b> | <b>Barbara Carnevale</b> |                           |
| 1944                        | Barbara Carnevale        | Betty Polk                |
| 1945                        | Barbara Carnevale        | Betty Polk                |
| 1946                        | Barbara Carnevale        | Debby Karol               |
| 1947                        | Barbara Carnevale        | Betty Polk                |
| <b>60<sup>th</sup> 1948</b> | <b>Barbara Carnevale</b> | <b>Heather Corbett</b>    |
| 1949                        | Barbara Carnevale        | Betty Polk                |
| 1950                        | Barbara Carnevale        | Betty Polk                |
| 1951                        | Barbara Carnevale        | Betty Polk                |
| 1952                        | Barbara Carnevale        | Debby Karol               |
| <b>55<sup>th</sup> 1953</b> | <b>Barbara Carnevale</b> | <b>Heather Corbett</b>    |
| 1954                        | Barbara Carnevale        | Sharon Howard             |
| 1955                        | Diane Robbins            | Sharon Howard             |
| 1956                        | Diane Robbins            | Ann Robinson              |
| 1957                        | Diane Robbins            | Ann Robinson              |
| <b>50<sup>th</sup> 1958</b> | <b>Diane Robbins</b>     | <b>Sharon Howard</b>      |
| 1959                        | Diane Robbins            | Sharon Howard             |
| 1960                        | Diane Robbins            | Ann Robinson              |
| 1961                        | Diane Robbins            | Ann Robinson              |
| 1962                        | Diane Robbins            | Ann Robinson              |
| <b>45<sup>th</sup> 1963</b> | <b>Diane Robbins</b>     | <b>Heather Corbett</b>    |
| 1964                        | Diane Robbins            | Ann Robinson              |
| 1965                        | Diane Robbins            | Ann Robinson              |
| 1966                        | Jocelyn King             | Debby Karol               |
| 1967                        | Jocelyn King             | Ann Robinson              |

|                             |                                    |                        |
|-----------------------------|------------------------------------|------------------------|
| <b>40<sup>th</sup> 1968</b> | <b>Jocelyn King</b>                | <b>Heather Corbett</b> |
| 1969                        | Jocelyn King                       | Debby Karol            |
| 1970                        | Jocelyn King                       | Debby Karol            |
| 1971                        | Jocelyn King                       | Debby Karol            |
| 1972                        | Jocelyn King                       | Heather Corbett        |
| <b>35<sup>th</sup> 1973</b> | <b>Jocelyn King</b>                | <b>Heather Corbett</b> |
| 1974                        | Jocelyn King                       | Heather Corbett        |
| 1975                        | Jocelyn King                       | Heather Corbett        |
| 1976                        | Jocelyn King                       | Debby Karol            |
| 1977                        | Jocelyn King                       | Heather Corbett        |
| <b>30<sup>th</sup> 1978</b> | <b>Jocelyn King</b>                | <b>Heather Corbett</b> |
| 1979                        | Jocelyn King                       | Sharon Howard          |
| 1980                        | Jocelyn King                       | Sharon Howard          |
| 1981                        | Jocelyn King                       | Sharon Howard          |
| 1982                        | Jocelyn King                       | Debby Karol            |
| <b>25<sup>th</sup> 1983</b> | <b>Jocelyn King</b>                | <b>Heather Corbett</b> |
| 1984                        | Annual Giving Staff                | Debby Karol            |
| 1985                        | Annual Giving Staff                | Debby Karol            |
| 1986                        | Annual Giving Staff                | Heather Corbett        |
| 1987                        | Annual Giving Staff                | Heather Corbett        |
| <b>20<sup>th</sup> 1988</b> | <b>Jocelyn King (tentative)</b>    | <b>Ryan Parker</b>     |
| 1989                        | Annual Giving Staff                | Jessica Weaver         |
| 1990                        | Annual Giving Staff                | Jessica Weaver         |
| 1991                        | Annual Giving Staff                | Jessica Weaver         |
| 1992                        | Annual Giving Staff                | Heather Corbett        |
| <b>15<sup>th</sup> 1993</b> | <b>Diane Robbins (tentative)</b>   | <b>Ryan Parker</b>     |
| 1994                        | Annual Giving Staff                | Jessica Weaver         |
| 1995                        | Annual Giving Staff                | Jessica Weaver         |
| 1996                        | Annual Giving Staff                | Jessica Weaver         |
| 1997                        | Annual Giving Staff                | Jessica Weaver         |
| <b>10<sup>th</sup> 1998</b> | <b>Becky Fernandes (tentative)</b> | <b>Ryan Parker</b>     |
| 1999                        | Becky Fernandes                    | Jessica Weaver         |
| 2000                        | Becky Fernandes                    | Ryan Parker            |
| 2001                        | Becky Fernandes                    | Ryan Parker            |
| 2002                        | Melissa Nederostek                 | Ryan Parker            |
| <b>5<sup>th</sup> 2003</b>  | <b>Becky Fernandes</b>             | <b>Ryan Parker</b>     |
| 2004                        | Becky Fernandes                    | Jessica Weaver         |
| 2005                        | Becky Fernandes                    | Jessica Weaver         |
| <b>2<sup>nd</sup> 2006</b>  | <b>Becky Fernandes</b>             | <b>Ryan Parker</b>     |
| 2007                        | Becky Fernandes                    | Jessica Weaver         |

## What is a mini-reunion?

Mini-reunions contribute to the success of any Reunion. They build interest and enthusiasm for Reunion and keep class spirit alive between reunions. The Office of Alumnae/i Relations and Annual Giving and the Alumnae/i Association are ready and willing to support class efforts to organize and implement successful mini-reunions by:

- Discussing program ideas with you
- Supplying lists and labels
- Printing and mailing invitations
- Helping to coordinate faculty and staff participants at the request of the class

**Regional and Special Event mini-reunions** are organized by geographic area and can be held at a class member's home or at a place of general interest in the area. Spouses and family members are often encouraged to attend. Some examples are:

- Class of 2001 hosted mini-reunions in New York, Washington, D.C., and Boston
- Members of the Class of 1986 gathered in Walt Disney World for a 30<sup>th</sup> birthday celebration
- Class of 1970 hosted a picnic for classmates and their families on Long Island
- Class of 1973 gathered in New York City for a 50<sup>th</sup> birthday celebration, and the Class of 1977 gathered in Newport, Rhode Island
- Class of 1956 gathered at Wheaton for Homecoming and enjoyed a special lunch together
- Golf outing at a Tournament Players Club (TPC) in your area
- Trip to New York City, with theatre, sightseeing and shopping
- Picnic luncheon at Tanglewood, summer home of the Boston Symphony Orchestra
- One day cruise from Warren, RI to Newport, RI, including brunch, sightseeing and shopping
- Weekend trips to Martha's Vineyard and Southern Maine

*Homecoming Weekend also provides an excellent opportunity for an on campus mini-reunion.*

Whatever your ideas, be sure to enlist the assistance of the Office of Alumnae/i Relations & Annual Giving, and remember that mini-reunions make your class stronger—and your next Reunion better than ever.

## **APPENDIX A**

### **Guidelines for Opening a Class Bank Account and Obtaining a Tax ID Number**

## **How do I establish a class bank account?**

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

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

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

Please note that classes who have already celebrated their 55<sup>th</sup> Reunion are no longer required to collect dues and maintain a treasury, except as needed in the year prior to Reunion.

## Guidelines for Filing a Class Tax ID Number

These instructions only apply to those classes who currently do NOT have a Tax ID number. Check with previous Class Officers to see if a number exists.

1. Obtain an **SS-4 Application for Employer Identification Number** form from the IRS Web site, which is [www.irs.org](http://www.irs.org). Look for the “ Form SS-4 ” and print out.
2. On line 1, fill out the form listing the “Legal name of entity“ as “ Wheaton College Class of XXXX.
3. On line 3, “ Executor, administrator, trustee, “care of name,” you enter YOUR NAME.
4. Lines 4a and 4b should be completed using YOUR HOME ADDRESS.
5. Lines 5a and 5b should be completed using WHEATON COLLEGE/  
NORTON, MA 02766.
6. Line 6 should list YOUR COUNTY?STATE.
7. On line 8a, check “NO.”
8. On line 9a, check “Other nonprofit organization” and specify by entering “College Class.”
9. Line 10, check “Other” and specify as “Class treasurer.”
10. On line 11, start date of “business” should be July 1, 20XX of year you take control.
11. Line 12, enter “June” because Wheaton Fiscal Year ends June 30<sup>th</sup>.
12. Other lines are self explanatory (check instructions). On line 16 - “Principal Activity,” check “Other” and specify by entering “Educational Reunions.”
13. Once completed, call the IRS number listed for your area on the instructions, and follow the touchtone instructions IF YOU HAVE ACCESS TO A FAX to send confirmation within 24 hours. Be sure to ask for the fax number.
14. If you DO NOT HAVE ACCESS TO A FAX, mail the form to the appropriate address listed in the instructions for your geographic area. You should receive an EIN within three weeks.

15. Once you have been assigned an EIN, it belongs to the class for as long as it is in existence. Be sure to put it in a safe place and pass it along to other Class Officers. The only things that will change are the mailing address and “care of” person. These changes must be made in writing, and instructions are also included here.

## **Guidelines for changing Reporting Name of Class for Tax ID Number**

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

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

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

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

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

## **APPENDIX B**

### **Creating a Class Newsletter**

## How do I create a class newsletter?

Class officers publish a letter or newsletter each fall that is mailed to all members of the class. This communication typically includes highlights of ALC and Homecoming Weekend, class news, event plans, Annual Fund updates and news from campus, along with any other messages or news the officers wish to convey.

Class officers are responsible for planning the content and layout of their newsletter (typically at ALC), as well as deciding which officer will be responsible for each piece. Each class officer team can design its own newsletter or can use a template we provide. Newsletters are due by November 9<sup>th</sup>.

### Instructions for using the newsletter template:

1. Go to <http://www.wheatoncollege.edu/alum/Volunteer/home.html>
2. Scroll to the bottom of the page and click on **Class Officer Sample Newsletter** (These instructions are also available as the next link down).
3. Save newsletter to your own desktop or hard drive (Save As).
4. Change the header and footer to reflect the class for which the newsletter is being created. To do this, go to **View**, then **Header and Footer**. Click anywhere in the header box to highlight, erase or change text. You can also click on the Wheaton seal, erase it and replace it with another graphic if desired. Scroll down to the footer and do the same. Hit **Close** (in the small editing box that should appear on your screen) to save your changes.
5. Change the content of the newsletter by clicking inside any text box, highlighting the text and deleting it. You can then replace the text in that box with your own content. You can change the photograph by doing the same.
6. If you would like to remove a text box altogether (to make room for other boxes, content or images), click once on the text in that box, then click once on the border of the text box. This will highlight the whole box, which you can erase with your delete key.
7. To create a new box(es), go to **Insert**, then **Text Box**. Put your cursor where you'd like the text box to appear and click. You can change the size and shape of the text box by clicking and dragging the sides or corners of the box. Place your cursor inside the box to begin typing content into the box. To remove the box, click on the box to highlight it, then click on any of the walls of the box (avoiding the circles within those walls). You should see a symbol that looks like a plus sign with arrows on the ends of each line. When you see this symbol, you can drag the whole box and place it where you want it.
8. The template is four pages long, although you may only need two. If you need to use more than two pages, you will need to create your own text boxes on pages three and four. If you need additional pages, place your cursor on the last page of the template, then click **Insert** and **Break**. Choose **Page Break**, which should create an additional page that includes the class Web address in the footer.

# **APPENDIX C**

## **What You Need to Know About the Annual Fund**

## Gift Chair Checklist

- ✓ Make your own gift
- ✓ Recruit your volunteers for the year
- ✓ Attend ALC/Homecoming Weekend – October 19-20, 2007
- ✓ Participate in volunteer calling – fall and spring semesters
- ✓ Send your completed pledge forms along with a thank you to your classmates to Wheaton College
- ✓ Help your class officer teams with the fall newsletter
- ✓ Review your class fundraising reports supplied by your staff liaison.

### **The Timeline:**

|                         |   |
|-------------------------|---|
| <b>August/September</b> | You will be contacted by your staff liaison team  |
| <b>September</b>        | Fundraising appeal is mailed by the Annual Giving office to build the case for support<br>Recruit class callers, if needed (Students will call Non-Reunion Classes)<br>ALC/Homecoming Weekend – October 19-20 |
| <b>October-November</b> | Class newsletters are mailed including your Annual Fund message<br>Volunteer Fall Semester calling if required.   |
| <b>November</b>         | Tax year end appeal is mailed to alumnae/i from the Annual Giving office  |
| <b>December</b>         | E-mail from gift chairs to December givers  |
| <b>February</b>         | Contact class callers and secure additional callers for spring calling  |
| <b>March</b>            | Class spring appeal to Lybunts<br>Volunteer Spring Semester calling   |
| <b>May</b>              | Final fundraising appeal. Call or e-mail all classmates who have not made a gift to encourage participation<br>Call or e-mail those with unpaid pledges before the June 30 <sup>th</sup> fiscal year end      |
| <b>June</b>             | Thank you calls/e-mails   |

# The Annual Fund Dictionary

## MARY LYON SOCIETY

Wheaton's group of leadership donors to the Annual Fund. A leadership gift is defined as a contribution of \$1,000 or more (for younger alumnae/i, the requirement is \$100-\$500, depending on year of graduation). Leadership giving historically represents 80% of our dollar goal and is critically important to Wheaton.

## WAYS OF GIVING

The college offers nine areas to which donors may designate their annual fund gift in order to support a particular interest. The nine ways to give are:

**Faculty Support, Student Scholarships, the Filene Center for Work and Learning, the Madeleine Clark Wallace Library, the Arts, Science Equipment, Student Activities and Athletics, Technology, Global Center and Where Needed Most** (the most often chosen).

## VOLUNTEER CALLING WEEKS

Volunteer calling takes place for two weeks in November and March each year. Alumnae/i volunteers participate and help keep their classes connected by making phone calls on behalf of the Annual Fund. Callers can choose how many calls they wish to make and are encouraged to join by the Gift Chairs.

## MATCHING GIFTS

Many companies and corporations match their employees' charitable contributions to colleges and universities. Encourage classmates to take advantage of this component of their benefit package, which means additional funds for Wheaton.

## LYBUNTS AND SYBUNTS

These are two terms that are used in the fundraising world to describe donors who have given in the past but have not given this year. LYBUNT stands for *Last Year But Unfortunately Not This* [year] and SYBUNT stands for *Some Year But Unfortunately Not This* [year]. Wheaton defines a Sybunt as a donor who has given in the last five years but did not give last year.

## WHEATON'S 2008 FISCAL YEAR

Wheaton's fiscal year begins on July 1, 2007 and ends on June 30<sup>th</sup>, 2008 taking place over two calendar years. The easiest way to think about it is to think of our fiscal year just as you would an academic year.

## The Annual Fund Calling Program

One of the best ways to keep your class connected is by building a network of volunteers in your class. Once you have assembled your team, you will call classmates during the fall and spring semesters, usually during November and March. Each volunteer caller will be provided a list of calls to complete and return completed forms to Wheaton for processing. Each Gift Chair and volunteer caller will be given a comprehensive volunteer training guide that runs through the calling process step by step. Training will be provided at ALC/Homecoming Weekend in October.

### COMMUNICATIONS

A recent alumnae/i survey reaffirmed our knowledge that personal phone calls from classmates and class appeals are the two most effective means of soliciting annual fund gifts from Wheaton alumnae/i. Therefore, it is imperative that Gift Chairs take the time to write thoughtful notes throughout the year to their classmates.

**Recruitment of volunteer callers** – This is best done by e-mailing or phoning classmates. Your staff liaison will assist you with this effort. Please be sure to stay in contact with your staff liaisons.

**Class newsletters** – During the fall semester, you will be asked to contribute a paragraph or two about the Annual Fund to be used in your class newsletter. This is your first opportunity to build a case for support and make sure classmates understand that all gifts have an impact and are appreciated.

**Spring appeal** – This is an opportunity to send a letter to classmates who have supported Wheaton in the past but have yet to make their gift this year. This spring mailing is very important and often will be followed up by an e-mail during the month of June as we close in on our target participation and dollar goals.

The Annual Fund staff has the responsibility of printing and mailing your letters and appeals. In most cases, we will simply include the signature that you provide us at the beginning of the fiscal year. **If you have yet to send your signature in, please contact our office as soon as possible.** If you prefer, you can personally sign the letters, and in this case, we can send the letters with stamped envelopes to you to sign and mail.

## METHODS OF GIVING TO WHEATON

Giving to Wheaton is easy. Anyone, anywhere can make a gift. Here's how it's done:

### How to give to Wheaton:

**By Mail:** Address gifts to Annual Fund Office, Wheaton College, Norton, MA 02766

**By Phone:** Call the Office of Annual Giving at 508-286-8226 or 1-800-896-3145, option Z.

**By Fax:** Fax your pledge to us at (508) 286-8268.

**By E-Mail:** Send a message to [alumnae/i@wheatonma.edu](mailto:alumnae/i@wheatonma.edu)

**By World Wide Web:** Make your gift online at <http://www.wheatoncollege.edu/alum>, then click on the *Make a Gift!* button.

### Methods of Payment:

**Checks** Our most popular form of giving. Make checks payable to the **Wheaton Annual Fund**. (Mail to Wheaton at the above address.)

**Credit Card** We accept VISA, MasterCard and American Express. This is a great way to manage a larger gift to the Annual Fund—giving donors the flexibility to pay a pledge in monthly installments. **Encourage classmates to use their credit cards to make giving more affordable.** (Visa, MasterCard and American Express gifts can be made via all of the methods listed above.)

**Giving Stock** Making a gift of securities is easy. Donors avoid capital gains on appreciated securities, while helping Wheaton at the same time. (To transfer stock, call the Finance and Operations Office at 508-286-8208 or email [mwilson@wheatoncollege.edu](mailto:mwilson@wheatoncollege.edu). You can access stock instructions on our Web site: [www.wheatoncollege.edu/AWN/Giving/Stock.html](http://www.wheatoncollege.edu/AWN/Giving/Stock.html))

### Matching Gifts

Matching gifts count toward donors' membership in leadership circles and toward a class' five-year reunion total. Most important, they are a wonderful resource of support for Wheaton and can double or triple the size of a donor's gift. Each donor should contact his/her company's Human Resources department for matching gift forms.

# **APPENDIX D**

## **How to Create or Maintain A Class Web site**

## How do I create or maintain my class Web site?

The Web is a great vehicle for communicating with your classmates and getting the word out about your class activities or plans for reunion. Wheaton is proud to offer each class its own Web pages to help you:

- Share details about pre-reunion programs or events (e.g., mini-reunions or regional gatherings)
- Recruit volunteers
- Find “lost” classmates
- Share class photos
- Provide information about online event registration
- Communicate contact information for class officers
- Survey classmates about their interests and needs
- Advertise class plans and activities

What you need to know about creating class Web pages:

1. Each class should identify a volunteer to serve as class Web master and assume responsibility for the class Web pages. This volunteer does not need to be especially computer savvy, as the creation and editing of the Web pages is as easy as typing in a basic word processor. The Class Web master should have regular access to a computer and a basic familiarity with the Internet.
2. Each Webmaster will be issued a user name and password to gain administrative access to class pages. Melissa Nederostek, Assistant Director of Alumnae/i Relations & Annual Giving, will provide training for new volunteers and ongoing support to all class Web masters.
3. The Web master should update and maintain class pages regularly so that the content stay’s fresh and there is frequently something new to keep classmates coming back.
4. Your Web pages can include any or all of the following:
  - updates on class plans and activities
  - photographs of classmates and their families
  - calendar of events
  - call for volunteers
  - reminder about class dues and donations to the Annual Fund
  - contact info for offices and others, including e-mail address links
  - and much more!
5. All class officers are asked to provide e-mail addresses to be included on the class home page so that friends and classmates can contact you directly with questions.
6. Check out the class Web pages for ideas at [www.wheatoncollege.edu/alum/class/](http://www.wheatoncollege.edu/alum/class/).

## **APPENDIX E**

### **How do I hold a conference call?**

## How do I hold a conference call?

Class officers are encouraged to hold regular conference calls. Wheaton can provide a conference call line to the team. To use Wheaton's conference call service, simply contact your staff liaison to schedule a call time and to receive dialing instructions.

Some officer teams choose to go through a non-Wheaton affiliated conference call line called **Free Conference Call**. This service is free and simple to use.

### Instructions for creating a conference call line:

1. Go to <http://www.freeconferencecall.com>.
2. On the left side of the page click the green **Get Free Service** button.
3. Provide your name and email address in the required fields.
4. Once you enter your name and e-mail address, you will be instantaneously provided with a dial-in number and access code for immediate phone conferencing.
5. Your new conference line is available to you 24/7 and there is no need to schedule or make reservations. Each account accommodates 96 callers on an unlimited number of 6 hour free conference calls.

FreeConferenceCall accounts also offers free conference call recording, accessible by phone or computer. You can also distribute, archive or even send recordings to your listeners via RSS and podcast.