

**Presidents & Vice Presidents Training:**

**WHAT IT TAKES  
TO DO OUR JOB**



**'H' Randy Morgan '87**  
October 1  
Class Officers Weekend 2010

# What is Our Job?

- **CHIEF VISIONARY**

- Create Goals for Year and Decades to Come
- Establish Projects and Strategies

- **CHIEF CHEERLEADER**

- Motivator
- Advocate

- **CHIEF NOODGE**

- Effective Manager
- Polite Yet Insistent

## *What to Noodge for?*

# Healthy Class Metrics

(Standard Requirements)

1. Reporting (Admin)
2. Officer Participation
3. Class Engagement
4. Development (\$)

# 1. Reporting

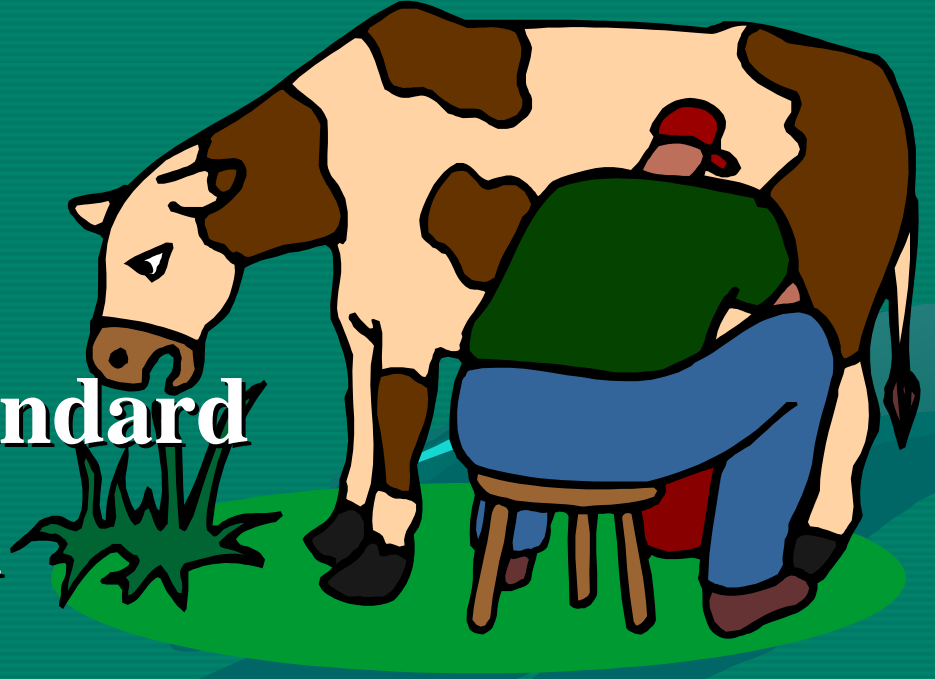
- **Financial Report to the College**
  - Treasurer
  - Due: **August 31**
- **Tax Return (Form 990)**
  - Treasurer
  - Due: **November 15** (or 15<sup>th</sup> of 5<sup>th</sup> Month after year end)
- **Class Activity Report**
  - President &
  - Entire Executive Committee
  - Due: **July 31**

## 2. Officer Participation

**COW**

**$\geq 3$  Officers Is Standard**

**All Should Attend**



**Year-Round**

**$\geq 6$  Officers Must Be Regularly Engaged**

**Ex: Class of '87 has 15 Officers/Execs**

# 3. Class Engagement

- **Class Notes** 6 Columns
- **Newsletters** 3
- **Website Updates** 4
- **Mini-Reunions** 3 (10+ Classmates)



# 4. Development

**Show me the \$\$**

- a) Class Dues**
- b) Dartmouth College Fund**
- c) Class Projects**

# *Class Dues*

- **Treasurer**
  - (Note deadlines for College mailings.)
- **Executive Committee**
  - (100% Exec Participation)
- **Participation:**

**40% +**

# *Dues Trivia*

40% class dues participation is considered “healthy”.

*What was the average % participation reported by classes 25 years out and younger last year?*

- A. 24 %
- B. 39 %
- C. 47 %
- D. None of the above.

Answer: The answer is A.

- B (39%) was the average for all classes.
- C (47%) was the average for classes 26+ years out.
- Best: 74% (Class of 1959)

# *Dartmouth College Fund*

- **Head Agents**
- **Executive Committee**
  - (100% Exec Participation)
- **Participation:**

**40% +**

# DCF Trivia

40% DCF participation is considered “healthy”.

*What was the average % participation reported by classes 25 years out and younger last year?*

- A. 23 %
- B. 28 %
- C. 40 %
- D. None of the above.

Answer: The answer is C.

- Average for all classes: 52%
- Average for classes 26+ years out: 58%
- Best: 93% (Class of 1960)

# DCF Trivia

Classes typically set goals to increase the \$ amount they give to DCF.

*On average, what % annual increase to DCF is recommended as “healthy”?*

- A. 5 %
- B. 7.5 %
- C. 12.5 %
- D. None of the above.

Answer: The answer is D.

**\$ - Up to You!**

# Funds Development

## Class Dues Participation

- Treasurer (Note deadlines for College mailings.)
- Executive Committee (100% Exec Participation)
- Participation: 40%+
- Dollar Amount:

**\$ - Up to You!**

## Dartmouth College Fund Participation

- Head Agents
- Executive Committee (100% Exec Participation)
- Participation: 40%+
- Dollar Amount:

**\$ - Up to You!**

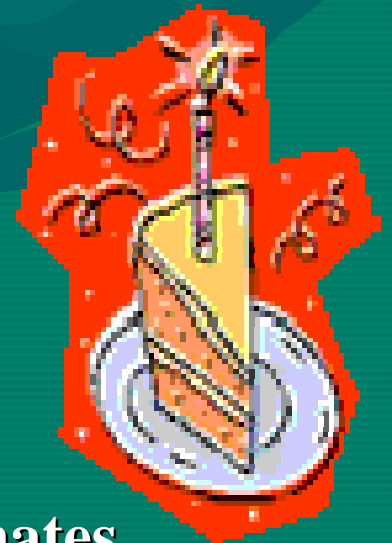
## Class Projects

- Dollar Amount:
- Participation:

**\$ - Up to You!**

# *Vision and Creativity*

- **Goals**
- **Class Projects**
  - Renovate a DOC cabin
  - Endowment to bring artists to Hopkins
  - Scholarships
- **Strategy**
  - Team
  - Methodical Systematic Schedule and Communications
  - Fun Culture
    - Birthday Greetings to Officers
    - Schwag Prizes for Turning In MIA Classmates



# *Vision and Creativity*

- **Fostering Creativity in Others**
  - **Brainstorm & Praise**
  - (creative Mini Reunions, etc.)
- **Evolution**
  - **Class' Needs, Goals, Vision Must Evolve**
    - **Succession Planning**
    - **Bereavement Policy**
    - **Social Media**

# *Healthy Class Metrics Summary*

## Metric

## Standard

### Reporting (Administrative)

Class Activity Report Filed Yes

Financial Report Filed Yes

### Funds Development

Class dues participation 40%+

Dartmouth College Fund participation 40%+

Class Project Yes

### Officer Participation

COW Participation 3

Year-Round Engagement 6

### Class Engagement

Class Columns (*Dartmouth Alumni Magazine*) 6

Class newsletters 3

Website updates 4

Mini-reunions 3(10+ classmates)

# *Standard Requirements – by Officer*

<b>President / Executive Committee</b>	<u>Standard</u>
<b>Class Activity Report Filed</b>	<b>July 31</b>
<b>COW Participation</b>	<b>3</b>
<b>Year-Round Engagement (Meetings, Telecons, Emails, etc.)</b>	<b>6</b>
<b>Treasurer</b>	
<b>Financial Report Filed</b>	<b>Aug. 31</b>
<b>Tax Return (990) Filed</b>	<b>Nov. 15</b>
<b>Class dues participation</b>	<b>40%+</b>
<b>Head Agents</b>	
<b>Dartmouth College Fund participation</b>	<b>40%+</b>
<b>Secretaries</b>	
<b>Class Columns (<i>Dartmouth Alumni Magazine</i>)</b>	<b>6</b>
<b>Newsletter Editors</b>	
<b>Class newsletters</b>	<b>3</b>
<b>Webmasters</b>	
<b>Website updates</b>	<b>4</b>
<b>Listserv Updates</b>	<b>Yes</b>
<b>Mini-Reunion Chairs</b>	
<b>Mini-reunions</b>	<b>3 (10+ classmates)</b>
<b>Class Project Directors</b>	
<b>Class Project(s)</b>	<b>Yes</b>
<b>Reunion Chairs</b>	<b>1 Year Out</b>
<b>Alumni Council Representative</b>	<b>Yes</b>

## 1987 Class Officers' Master Calendar for 2010-2011

<b>October</b>		
1-2	CLASS OFFICERS WEEKEND	H & Officers
2	1 <sup>st</sup> Agent Email	Tim /Raffiq
5	<u>Quarterly Telecon</u>	H & Officers
10	Provide list of potential new participation callers	Tim / Raffiq
12	Presidents' Email (class update)	H
15	Email to recruit new callers	Tim /Raffiq
15	Email to re-confirm existing callers	Tim /Raffiq
27	Draft of Head Agents' Email/Letter Circulated	Tim /Raffiq
27	Deadline for Column 1 (2 month lead-time)	Melissa / Wendy
30	HOMECOMING Mini-Reunion (Hanover)	Laura / Christen
<b>November</b>		
1	1 <sup>st</sup> Dues letter	Anne
3	Update website	Jenifer / Julie
15	Fall Newsletter (#1) sent to College	Christen /Amy
15	990 Tax Return Due	Anne
20	Calling list to be sent to volunteers	Tim /Raffiq
<b>December</b>		
4	Update website	Jenifer / Julie
29	President's Email	H
29	2 <sup>nd</sup> Dues letter	Anne
29	Submit Column 2	Melissa / Wendy
<b>January</b>		
8	Update website	Jenifer / Julie
10	2 <sup>nd</sup> Head Agents' email sent out	Tim /Raffiq
12	<u>Quarterly Telecon</u>	H & Officers
15	Volunteers call 3 year lapsed	Tim /Raffiq
<b>February</b>		
28	Submit Column 3	Melissa / Wendy
<b>March</b>		
1	Send Head Class Agents' 2 <sup>nd</sup> letter	Tim /Raffiq
1	Spring Newsletter (#2) by Email	Christen /Amy
3	President's email	H
3	Update website	Jenifer / Julie
9	<u>Quarterly Telecon</u>	H & Officers
15 to mid-Apr	M-R nights around the country	Laura & Team
<b>April</b>		
3	Volunteers call remaining non-donors	Tim /Raffiq
12	Update website	Jenifer / Julie
14	3 <sup>rd</sup> Dues letter	Anne
27	Submit Column 4	Melissa / Wendy
<b>May</b>		
1	3 <sup>rd</sup> Class Agents' email	Tim /Raffiq
5	Update website	Jenifer / Julie
<b>June</b>		
1	4 <sup>th</sup> Class Agents' email	Tim /Raffiq
5	<u>Quarterly Telecon</u>	H & Officers
15	Summer Newsletter (#3) to College	Christen /Amy
15	Update website	Jenifer / Julie
22	Presidents' email (DCF/Dues Push)	H
28	Submit Column 5	Melissa / Wendy
30	DCF & Dues Deadlines	
<b>July</b>		
12	Update website	Jenifer / Julie
31	CAR Report Due	H & Officers
<b>August</b>		
28 approx.	Submit Column 6	Melissa / Wendy
31	Financial Report Due to College	Anne
<b>September</b>	<b>NEXT COW</b>	<b>EVERYONE</b>

# *Best Practices*

## *1. Team Building:*

- Pick “doers” not “talkers” from diverse elements of the class.
- Consider co-officers for some roles.
- Delegate.

## *2. Goals:*

- Create 1-year and Full-Term Goals.
- Plan from the Future

## *3. Individual Accountability:*

- Constantly prod, cajole, and coerce each officer to do his/her job.
- Replace those who don't.
- Annually evaluate Officers' performance against annual & 5-year goals.

## *4. Class Projects:*

- Initiate and support innovative class projects behind which classmates can rally.

## *5. Meetings:*

- Meetings – are the rhythmic heartbeat for the Executive Committee.
- [FreeConferenceCall.com](http://FreeConferenceCall.com)

## *6. Communications:*

- Develop a Strategic Communications Plan using every medium available to communicate a consistent message to your classmates.
- Communicate with the entire class at least 4x per year
- Broadcast the Goals and progress being made on all class activities.

# *Help Is on Its Way*

## **Office of Alumni Relations**

- They know techniques and tools
- Class Presidents Manual

(<http://alumni.dartmouth.edu/classes/ToolsforLeaders>)

## **Other Classes' Officers**

- Use COW as opportunity to get new ideas

## **Your Classmates**

- You'll be surprised how many will be excited to get involved when you ask them

# Presidents & Vice Presidents Training

**Thank you!**

