



# Phillips Exeter Academy

Regional Association  
Handbook

September 2008

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# Introduction

More than eighteen thousand alumni/ae, five thousand parents (past and present), grandparents, widows, and friends are served by Exeter's regional associations worldwide. Run by local alumni/ae and parent volunteers, these associations strengthen the tie between Exeter and the constituents in their regions through various events and activities.

Currently, there are fifty-one regional associations worldwide, ranging in size from fifty to over three thousand members. Each regional association establishes its own organization and event calendar in coordination with the Alumni/ae Affairs Office. The associations sponsor functions such as formal and informal social or professional gatherings, continuing education programs, community service projects, and cultural and athletic events; assist the Academy's Admissions Program; and support Annual Giving phonathons. The frequency of activity varies from one event every few years to six events annually.

While regional associations may have different organizational structures, all are bound together by a common commitment to these broad purposes:

- To strengthen and expand the involvement, commitment, and tie of alumni/ae, parents, and friends to each other and the Academy.
- To initiate and encourage activities which further an ongoing relationship between Exeter and its regional constituency and promote the best interests of the Academy.
- To increase attendance at events, with an emphasis on first-time alumni/ae event attendees.
- To enlist the service and support of alumni/ae, parents, and friends in the following areas:
  - admissions
  - communications
  - fundraising
  - public relations

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# How to Start or Energize an Association

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## *PROCEDURE*

To start or energize a regional association, one element is essential: a core group of interested alumni/ae and parents who are committed to strengthening the ties to the Academy through local events and activities. If the local initiative is present, here are some organizational guidelines that will prove useful.

- Send or email a questionnaire to local constituents. Completed questionnaires will generate additional volunteers and event ideas.
- Form a representative core group of three to ten alumni/ae and parents to serve as the leadership committee. Be sure to include alumni/ae from all demographic groups, including recent graduates, to stimulate the involvement of young alumni/ae and to develop future leadership.
- Hold an initial planning meeting of the core group to review the mission, outline a plan of action and determine areas of responsibility. Appoint a president to coordinate group activity and to serve as a liaison with the Academy.
- Have focus and purpose with the goal being to connect as many alumni/ae and parents as possible to the Academy.
- Determine a kick-off event, using connections, resources, and ideas from your core group of constituents.
- Establish and assign phone and email trees in order to boost attendance.\*
- Use the Alumni/ae Affairs Office for logistical and planning support and direction.

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## *AN ORGANIZATIONAL PRIORITY*

\*One of the most crucial roles of regional association volunteers is to contact others within their region to encourage attendance at an upcoming event. Nothing is more effective than a phone call or email from a classmate expressing enthusiasm and a desire to get several members of the class together at the event.

The Alumni/ae Office will provide contact information. The online alumni/ae directory, Exie-Net, may be used also.

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## ***EXETER REGIONAL ASSOCIATIONS***

Each Regional Association of Exeter holds different expectations from the Academy, has different regional needs, and is made up of a unique alumni/ae and parent base. Based on these different characteristics, Associations are organized into two categories:

**Category One** — Large metropolitan areas with a concentration of alumni/ae and parents.

**Characteristics of Category One Regional Associations may include one or all of the following:**

- Constituency size: 400 or more
- Leadership of eight to ten alumni/ae and parents
- Three to seven events annually

### **Locations**

Chicago, Greater Los Angeles, Greater New York, New England (Boston), Northern California (San Francisco), Seacoast (New Hampshire), Washington (Seattle/Tacoma), Washington, D.C./Baltimore

**Category Two** — All other regions

**Characteristics of Category Two Regional Associations may include one or more of the following:**

- Constituency size: 50-500
- Led by one to three alumni/ae and parents
- Events held every 1 to 3 years

### **Locations**

Atlanta, Austin, Central Florida, Cleveland, Colorado, Dallas/Ft.Worth, Delaware, Hartford, Hawaii, Houston, Indiana, Kansas, Louisiana, Maryland, Michigan, Minnesota, Missouri, North Carolina, Oregon, Philadelphia, Phoenix, Pittsburgh, Portland, ME, Princeton, San Antonio, San Diego, South Florida, Southwest Florida, Tucson, Vermont, Worcester

Brazil, France, Bangkok, Hong Kong, Japan, Korea, Shanghai, Singapore, Switzerland, Taiwan, Toronto, United Kingdom

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## ***OFFICER AND LEADERSHIP BOARDS***

Some regional associations will benefit from forming a Leadership Board. The following are guidelines for organizing a board structure:

- A Leadership Board consists of 8 to 15 volunteers who are actively involved in the planning and support of the regional association. This board is a dynamic group.
- Officers of the association should be carefully selected from this Leadership Board for their follow-through skills and commitment to Exeter.
- Officers should be given specific duties; should have terms that do not exceed two years; and should have a succession plan in place.
- Officers take the initiative to plan and implement association events and activities, and work together to encourage attendance at all events.

***President:*** presides at all meetings, appoints or recruits event chairpersons, and communicates with the Alumni/ae Affairs Office to help create and implement an annual events calendar. Develops strategies to increase participation and involvement, and cultivates the next president. Acts as a local representative, responding to inquiries from alumni/ae.

***Vice President:*** assists the president in all his/her duties. Responsible for increasing attendance at events. In some regional associations, the vice president becomes the next president.

***Secretary:*** takes minutes of association meetings and emails them to the Alumni/ae Affairs Office after each meeting for distribution to the leadership group. Submits announcements of events and photos for *The Exeter Bulletin*.

***Treasurer:*** acts as advisor to event planners for determining the fee to charge in order to "break even." Reports on event income and expenditures to the leadership group.

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# How to Effectively Manage an Association

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## *LEADERSHIP GUIDELINES*

Strong leadership is essential for maintaining a successful regional association. The following guidelines are intended to assist leaders in the management of your association.

### **Develop an annual calendar**

Set your goals for the year early. Hold an annual meeting with the officers and key volunteers to discuss the upcoming year's activities, timetables and strategies to increase attendance. Include a schedule of regular meetings. (See Sample Annual Calendar, page 10.)

### **Be realistic**

More is not better. Attempt only what you can do well. Communicate any concerns to the Alumni/ae Affairs Office.

### **Seek new active volunteers and use Exie-Net**

Get to know as many alumni/ae and parents in your region as possible. Identify, recruit, and utilize talent, connections and offers to help. The online alumni/ae directory on Exie-Net will be a great resource for you.

### **Delegate responsibility**

Assign one person to act as the coordinator of each event. You can determine future leaders this way.

### **Define your expectations clearly**

Know what you expect the volunteers to do and be sure they understand your expectations and responsibilities.

### **Keep the association solvent**

Be self-sustaining. Be sure the event fees cover all expenses.

### **Show appreciation constantly**

To keep volunteers, you need to give credit. Write notes, make phone calls, give pats on the back. Identify outstanding volunteers and ask the Alumni/ae Affairs Office to write letters of appreciation.

### **Revitalize yourself**

Be sure to attend important Academy meetings to keep your energy, awareness and commitment level high. Attend Alumni/ae Council Weekend, Homecoming and Reunion.

### **Evaluate, evaluate, evaluate**

Use the Event Evaluation Form to determine if goals were achieved, and also consider the following:

- Who attends events?
- What percentage of the association's constituents attended at least one event over the past year?
- Is your association experimenting with new activities?
- Does the association anticipate all costs for events?
- Have you tried to plan events that target different groups?
- Are your active volunteers growing in numbers?
- What changes need to be made for future events?
- Which segment of the constituency had low attendance? What kinds of events would target this population?

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# How to Plan Well-Attended Events

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## *TEN EASY STEPS*

Here are the essential steps to make your events successful:

**1. DETERMINE PURPOSE (TWELVE WEEKS BEFORE EVENT)**

Always consider the purpose of your event. Does it support the mission of regional associations? Will the event appeal to constituents in your region based on its demographics?

**Publicize:** Get details to the Alumni/ae Affairs Office for an announcement in *The Exeter Bulletin* and on your regional association page at Exeter's web site.

**2. SELECT FACILITY (NINE WEEKS BEFORE EVENT)**

Be sure the location and date are convenient for the group and will complement the event's purpose. Confirm that there are no known gender, religious or racial discrimination policies at the facility and that the date does not conflict with any holidays.

**Determine Price:** Consider all costs. Utilize local alumni/ae and parent resources (entertainers, restaurateurs, wine donations, etc.).

**3. COMPLETE EVENT PLANNER (TEN WEEKS BEFORE EVENT)**

Discuss details with the Alumni/ae Affairs Office. See the Sample Event Planner on page 11.

**4. CREATE INVITATION OR DRAFT (EIGHT WEEKS BEFORE EVENT)**

Email or fax a draft of invitation to the Alumni/ae Affairs Office. Determine the mailing population.

**5. WATCH YOUR MAIL/EMAIL FOR THE INVITATION (SIX WEEKS BEFORE EVENT)**

Please respond and encourage other leaders to respond promptly.

**6. ACTIVATE ATTENDANCE STRATEGIES (THREE WEEKS BEFORE EVENT)**

**Implement phone trees, send email announcements. This is the most important step. Exie-Net is the tool to use. The online Events Calendar will have all the details.**

**7. RSVP DEADLINE (ONE WEEK BEFORE EVENT)**

Work with the Alumni/ae Affairs Office to make final arrangements with the facility, consider details for the reception table and any greeter and speaker requirements, including welcoming remarks, introductions, and special acknowledgments.

**8. ATTEND (EVENT)**

Take pictures, assist at the registration table, and have a good time.

**9. SEND FINAL ACCOUNTING (DAY AFTER EVENT)**

Forward any payments collected at the door, the final attendance list, and film or pictures with identifications to the Alumni/ae Affairs Office for publication in *The Exeter Bulletin*.

**10. COMPLETE THE EVENT EVALUATION FORM (WITHIN A WEEK AFTER EVENT)**

Discuss results with the Alumni/ae Affairs Office. Send a thank-you note to the event speaker.

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## ***SUGGESTED ACTIVITIES***

In planning events, consider activities which will draw alumni/ae and parents who have not attended previous Exeter programs. The most successful events have been those:

1. events that are unique to the area and that provide added value (special tour of art exhibit with lecture by an expert, theatre event with post-show discussion with music director, tall ships tour, professional league game preceded by a dinner and special speaker at the stadium) and
2. events that alumni/ae want to attend with their children (baseball games, zoo, and circus events)

To assist you in generating new ideas for varied events, we offer the following suggestions.

- **Interesting Cultural Locations or Places of Local Interest:** gallery/museum exhibit openings, ethnic restaurants, private homes. Some of the alumni/ae and parents in your area might work in interesting places to tour—museum, a movie studio, TV station, or library.
- **Sports Events:** baseball/soccer games, golf/tennis matches, Exeter/Andover game.
- **Outings:** theater event, symphony gathering, hike, whale watch, raft/canoe trip, ski/sail day or weekend, tour and boat cruise.
- **Young Alumni/ae:** socials, boat cruises, life skills sessions, art/museum tours, theatre, sporting events.
- **Seminars/Panel Discussions:** college counseling, writing course, Saturday School, fireside chats, foreign policy, money management, career development, health-related issues.
- **Community Service:** Work for *Habitat for Humanity*, serve meal at homeless shelter, sort food at a co-op, get involved with local community service organizations.
- **Formal Events:** Annual dinners or receptions, Exeter faculty or local alumna/us speaker, Exeter concert choir tour events, theatre, concerts.
- **Luncheons:** Speaker/slide presentations by Exeter faculty/alumni/ae and parents on topical matters such as sports, investments, city planning, or career planning.

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# How to Budget and Break Even

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## *COVER YOUR COSTS*

Your goal is to make your association self-supporting. The Alumni/ae Affairs Office has a modest budget for assisting regional associations with postage, mailing costs, and faculty/administration travel. Regional association volunteers are urged to be mindful of all costs. Weigh potential success of activities against all expenses.

- **Make Events Self Supporting:** In some cases (New Student Receptions, for example), it is inappropriate to charge fees. Alumni/ae or parents usually host these events.
- **Ask Hosts to Underwrite Events:** The host of a small gathering will often volunteer to bear most or all of the expenses.
- **Charge More for One Event to Underwrite Others:** Be sure to include an explanation for the higher fee by stating that a portion will be used to help defray the costs of, for example, a New Student Reception or young alumni/ae at the Annual Reception.
- **Ask for donations in conjunction with an event.** For example, request guarantors \$250, patrons \$150, sponsors \$100, and donors \$50 on a reply card. When you request donations, explain how the money will be used

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## *ACCOMMODATE YOUNG ALUMNI/AE*

You should consider providing a sliding scale for event fees for young alumni/ae. Typically, regional associations offer a reduced rate to alumni/ae who are fewer than five years out of the Academy. Also consider providing a "no charge" event targeted to young alumni/ae.

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# Alumni/ae Affairs Office

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## *WHAT YOU CAN EXPECT FROM US*

The Alumni/ae Affairs Office staff is your main resource, providing assistance to make your events successful. Call us for suggestions and specific requests. Determine the targeted demographic, initiate an idea and we will help you follow through.

### *REGIONAL EVENTS ASSISTANCE*

Once you have an idea for an event that targets a specific goal, the Alumni/ae Affairs Office will:

- Offer event funding advice.
- Arrange faculty/administration speakers.
- Follow up with the event facility and sign any contracts.
- Furnish current mailing and email addresses and telephone numbers of alumni/ae and parents for phone trees and email announcements and screening of future speakers.
- Produce and mail invitations with a reply device at least five weeks before event date.
- Send email announcements and email reminders
- Collect and process all event fees, payments and donations.
- Provide all registration table materials.
- Track attendance (but we may rely on your assistance to obtain accurate attendance lists).

### *REGIONAL EVENTS ASSISTANCE*

- Assistance in using Exie-Net. The online alumni/ae directory is a helpful resource.
- Provide lists of alumni/ae and parents sorted:
  - alphabetically, by class, or in zip code order
  - in specific groups such as: Class Officers, those who attended reunion, those who played hockey while at Exeter, etc.
  - by colleges attended, occupations, or employer
- Promote events on Exeter's home page and in *The Exeter Bulletin*.
- Distribute school calendars; the *Exonian* and other student publications; and admissions, summer school and athletic brochures.
- Write letters of appreciation to exceptional volunteers and event speakers.

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# Planning Tools

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## *ANNUAL CALENDAR*

The following calendar is intended to show the variety of events that may be planned. Demographic information must be considered when determining the types of events to be held.

<b>Annual</b>	Association Reception with speaker or program Consider PEA Academic calendar when scheduling events appropriate for attendance by students
<b>Summer</b>	Outdoor or sporting event for families
<b>Fall</b>	Volunteers attend Alumni/ae Council Weekend at Exeter Regional association volunteers meet to draft upcoming year's calendar of events and meetings Community Service Project Annual Fund Phonathon
<b>Winter</b>	Continuing Education event Cultural Event (theatre, music, museum exhibit). Young alumni/ae social
<b>Spring</b>	Panel discussion showcasing alumni/ae within a particular profession. Family oriented event Annual Fund Phonathon

**EVENT PLANNER**

Today's Date: \_\_\_\_\_

Local Coordinator: \_\_\_\_\_

Event: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Speaker: \_\_\_\_\_

Email: \_\_\_\_\_

Date: \_\_\_\_\_

Targeted Demographic \_\_\_\_\_

Location: \_\_\_\_\_

Attendance Building Strategies: \_\_\_\_\_

Dates and Number Constituents Mailed and Emailed: \_\_\_\_\_

Invitation Mail Date: \_\_\_\_\_

Confirmation Email/Mail Date: \_\_\_\_\_

**Projected Expenses**

Estimated Printing/Copying unit cost:		Meal cost per person	\$ _____
Formal Printed Invitation	\$ <u>.44</u>	Gratuity	\$ _____
Flyer or Postcard	\$ <u>.05</u>	Tax Exempt Applicable?	_____
# units:	x _____	Subtotal	\$ _____
Total	\$ _____	Target # Attendees	x _____
Estimated Postage unit cost/first class:	\$ <u>.41</u>	Total	\$ _____
unit cost/bulk:	\$ <u>.21</u>	Facility Cost:	\$ _____
# units	x _____	Other Costs: _____	\$ _____
Total	\$ _____	_____	\$ _____
Cost per Attendee	\$ _____	_____	\$ _____
<i>(Total Expenses divided by Target Number of Attendees)</i>		Total Projected Expenses:	\$ _____

**Projected Revenues**

Event/Ticket Price per person:	\$ _____
Target Number of Attendees:	\$ _____
Subtotal (price x attendees)	\$ _____
Total Projected Donations:	\$ _____
Total Projected Revenues (subtotal + donations):	\$ _____

**Projected Expenses** \$ \_\_\_\_\_  
**Projected Revenues** \$ \_\_\_\_\_  
**Net:** \$ \_\_\_\_\_

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***EVENT EVALUATION FORM***

Program/Event: \_\_\_\_\_

Date: \_\_\_\_\_

Concept: \_\_\_\_\_

Goal and Target Audience: \_\_\_\_\_

Invitation:

# Mailed/Emailed: \_\_\_\_\_

# Attended: \_\_\_\_\_

Strengths: \_\_\_\_\_

Possible Improvements: \_\_\_\_\_

Total Costs and Total Fees Collected:

Budget: \_\_\_\_\_

Actual: \_\_\_\_\_

Additional Comments and Suggestions: \_\_\_\_\_

**Phillips Exeter Academy**  
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<http://phillips.exeter.edu>

For more information about Phillips Exeter Academy's Regional Association Program, please call the Office of Alumni/ae Affairs at 603-777-3454.