



WAKE FOREST
UNIVERSITY

WAKE FOREST CLUBS RESOURCE GUIDE



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INTRODUCTION & OBJECTIVE OF THE WAKE FOREST CLUBS PROGRAM

The Wake Forest Clubs program seeks to renew the ties between the University and its alumni and to provide opportunities for alumni to renew their ties with one another. These clubs are focused on engaging alumni, parents and friends of all ages. By reflecting the best of the Wake Forest experience – the friendliness of social interaction, the stimulation of intellectual discussion, the excitement of athletic competition, the satisfaction of service to others – the Wake Forest Clubs Program reminds all who attend of the special qualities that enriched their Wake Forest experience.

Each year, clubs nationwide sponsor social and educational programs in their community. In addition, the clubs provide professional and career networking opportunities, celebrate local alumni accomplishments and encourage philanthropic support of the University.



CLUB LEADERSHIP

The success of each club is the direct result of the advance planning and creative thought of the Club's Officers and Executive Committee Members. Club leadership serves as the centralized organizing body for each local Club and implements the programmatic offerings. Some clubs have an officer structure while others have an executive committee to lead local efforts. Many Clubs also benefit from the leadership, counsel and network of an Advisory Committee which is comprised of area alumni, parents and friends who can provide venues, communication networks and speakers for club events.

Alumni Council members are asked to serve as a member of their local Club's Executive Committee when possible. This includes attending club meetings, events, serving as an event host and as a resource for the local club community. For a list of Alumni Council members from your area, contact the Alumni Services Office.

Wake Forest Clubs are aligned by region and demographic similarity. When determining the appropriate leadership structure for your club or in trying to brainstorm for successful event ideas, feel free to contact other club presidents.

Visit alumni.wfu.edu/clubs/ for up-to-date club leadership and event listings.



ALUMNI OFFICE RESPONSIBILITIES & CONTACT INFORMATION

The Alumni Office staff serves as a resource for you and other club members.

- **What We Can Provide:**

- Strategy & Feedback on event ideas, implementation, goals;
- Demographic information for the market (e.g. Age, Vocations, Locations, Gender, etc.)
- Broadcast emails & outreach: If you are planning an event, a survey, requesting volunteers, or simply maintaining contact with those in your area, you can draft an email and have it sent on your behalf through the Alumni Office.
- Payment Processing: The Wake Forest Clubs program aims to break even on club events. Event attendees register on the clubs website and pay an attendance fee when they register. Invoices for catering, venue services, etc. are to be sent directly to the Alumni Office for payment.
- Volunteer Identification: We are always looking for additional volunteers. University representatives periodically travel to your region to engage alumni face-to-face and encourage further involvement in the club.

- **What We Cannot Provide:**

- Excessive e-mail communication: University Policy dictates email communication from all offices on campus. Club emails are limited to two per month, unless circumstances should necessitate additional outreach.
- Funding: All club events are expected to break even. However, Wake Forest does offer additional funding opportunities (listed under Funding).
- Event implementation: It is our desire to support you and the other volunteers. We hope to foster collaboration among your executive committee and offer helpful resources as you seek to maintain and grow the Wake Forest presence in your area.

Any questions regarding club leadership or event programming can be directed to the Alumni Office staff. Find our contact information on alumni.wfu.edu/staff/.



EVENT IDEAS

When planning an event, consider the demographic your club is attempting to reach. Is this for all alumni in the area, only young alumni, families, older alumni, or professionals of a particular industry, etc.? What are the event's goals? Networking, education, social or service to the community? Leverage events already taking place locally.

The following are common types of programming:

ARTS & CULTURE:

- Museum Tours
- Zoo
- Aquarium
- Wine Tastings
- Cooking Classes
- Theater
- Picnic – while attending movie/concert outdoors

ATHLETIC:

- Game Watching Events
- Attend Away Basketball/Football Games
- Professional Sporting Events
 - Pre- or post-game events featuring former WFU Players

PROFESSIONAL & INTELLECTUAL DEVELOPMENT:

- Lunch n' Learn Series
- Networking breakfasts, lunches, happy hours
- Networking Panel Discussion
- Faculty speaking engagements
- Events with University leaders

SOCIAL:

- Young Alumni Programs
- Welcome Receptions – New Alumni
- Dining with Deacs
- Joint events with other Universities
- Holiday Parties



SERVICE:

Habitat for Humanity
Food Bank
Partnering with Charter Schools
AIDS/Breast Cancer Walks – Wake Forest Team
Outdoor Cleanup

ADDITIONAL CLUB OPPORTUNITIES:

- **Information Exchange:** To inform alumni, parents, and friends of the University about initiatives, activities, and challenges, while also providing Wake Foresters with an opportunity to communicate ideas to the University. To encourage people to update their contact information with the University in order to stay connected.
- **Welcome and Recruitment:** To introduce local students to Wake Forest and to welcome new students into the Wake Forest family. This also includes recent graduates, alumni who have recently moved and parents of current students.

Visit the Wake Forest Clubs website to see what other clubs are doing around the country:
alumni.wfu.edu/clubs/.

In the **appendix**, you will find several event summaries that provide step-by-step directions on how to execute activities that have been successful. Also, an event template is included to facilitate all facets of planning for a successful event.

To monitor event registrations, visit: <https://alumni.wfu.edu/clubs/cms/attendance.php>. The Alumni Office will provide you with a login and password.



BILLS & EXPENSES

The Alumni Office will work with the event host/local club representative to manage event payment and sign contracts. Prior to making arrangements for direct billing or contracts, please contact your designated member of the Alumni Office.

All event registration will take place on the WF Clubs site and must be paid by credit card.

GIFT-IN-KIND CREDIT

If an individual chooses to defray the cost of an event, the University can extend a gift-in-kind credit. Some examples that might qualify for gift-in-kind credit include catering services, venue/meeting room rental costs, equipment rental, registration fees, etc. The amount will be credited to the Wake Forest Fund for the donor for the amount expensed. For assistance in leveraging a gift-in-kind credit to offset an event cost, please contact the Alumni Office.

FUNDING OPPORTUNITIES

All events are expected to break even, therefore, accurate attendance and cost estimates are very important. There are opportunities for clubs to receive assistance in offsetting some event costs:

- The Innovation Fund is designed to encourage creative programming generated by local clubs. On an annual basis, each club will have an opportunity to propose programming ideas to a committee comprised of members from the Wake Forest Alumni Council. Selected proposals will receive funding from the University. For additional information on the Innovation Fund, visit: wfu.edu/alumni
- University Sponsored Events – The University and Alumni Office sponsor a small number of events in markets. These events usually feature a University administrator.



MARKETING YOUR EVENT

Once event details are organized, it is important to publicize the event appropriately. The University will handle all email invitations and publicize the event on the clubs website. Additional marketing tools are:

- Word of mouth
 - Encourage club officers, executive committee members and event participants to talk up events amongst their own network of friends
 - Divide lists of local alumni among club officers, executive committee members and event participants and make a quick phone call to invite alumni to the event; people are more likely to attend events if they feel a personal connection to someone who will be attending the event, so offer to meet up with them to introduce them around at the event if they are not regular event attendees
 - If you are not comfortable with cold-calling, then a quick hand written note or email can have the same impact!
- Announcements during other club events
 - During any club event, ensure that you mention upcoming activities to make sure people reserve the spot on their calendars in advance!
- Social networking sites
 - Facebook
 - LinkedIn
 - Twitter

SOCIAL MEDIA

While club events, updates, and registration are all to be primarily accessed through the Wake Forest Club website, social media provides excellent platforms for expanding alumni outreach. Through Facebook, LinkedIn, and Twitter we can engage those who may not have updated their account information with Wake Forest. These tools can also assist in fostering engagement among alumni outside of club events and in facilitating an otherwise active alumni region within your market.

FACEBOOK

Most Clubs have a Facebook group or page already in place. To see if your club already has one, check for a link on your club website off of alumni.wfu.edu/clubs. If you think a Facebook group or page would foster engagement for your club, contact Gretchen Edwards in the Alumni Office in order to have one set up. It's important that the purpose, goals and ongoing management of the group or page are established before one is created.

- **Facebook events**
 - When your club is hosting an event, you can create an event on Facebook (either through the Club group or page, or off of a personal profile.) Input the details (date, time, location) and any specific information guests may need to know (cost) along with the link to the RSVP/registration pages.



- It's important to stress within the Facebook event that alumni should RSVP/register on the Wake Forest website for accurate attendance; simply responding to the Facebook event will not qualify as an official registration, especially if pre-payment is required.
- **Examples of Alumni Facebook groups or pages**
 - [Atlanta](#)
 - [Boston](#)
 - [Charlotte](#)
 - [Nashville](#)
 - [Washington, DC](#)

LINKEDIN

Most clubs already have a LinkedIn group in place. We encourage you to join the overall Wake Forest Alumni LinkedIn group (go.wfu.edu/linkedinwfalumni) and any of the 20 regional LinkedIn subgroups that interest you. These can be accessed off of the overall Wake Forest Alumni LinkedIn group.

If you think a regional LinkedIn group would foster engagement for your club, and you have not found an existing one, contact Gretchen Edwards or Kellyn Springer in the Alumni Office in order to have one set up. It's important that the purpose, goals and ongoing management of the group are established before one is created. Please remember that LinkedIn should primarily be utilized to market networking or professional development events.

- **Tip for researching if your Club has a LinkedIn group:**
 - Make sure to confirm that your market/region does not already have a LinkedIn group created
 - If your market/region already has a LinkedIn group, then contact the administrator to establish a process for career/networking events to be marketed on the group page
 - 1. Go to LinkedIn.com; login using your account name and password (you must be a member of LinkedIn to check the status of a group)
 - 2. In the top navigation bar, select "Groups" > "Group Directory"
 - 3. Using the search box on the top left, search for "Wake Forest" and review the results
 - You can also join the Wake Forest Alumni group, go to "More..." towards the top right > click Subgroups > review the results
- **Networking and Career Development Event Marketing**
 - Leverage your LinkedIn Wake Forest Group to announce networking and career development type events
 - Post event information 2 - 4 weeks prior to the event and any other time leading up to the event. Be sure to include the link to the registration page on the WF Clubs website so that alumni can RSVP/register accordingly



APPENDIX

EVENT TEMPLATE

Leverage this template when planning events to ensure consideration for all details prior to, during and after an event. The Alumni Office has a renewed focus on evaluating the success of events once they are complete, so please be sure to notify them after an event has concluded so they may share best practices with other tier markets.

- I. **Set the event** (4 - 8 weeks in advance, depending on the event)
 - a. **Determine type of event:** social, networking, service, etc.
 - b. **Select date:** you will want to be mindful of holidays, school schedules, family conflicts and local activities)
 - c. **Research locations:** consider room rental, convenience, non-discriminatory policies, accessibility
 - d. **Estimate costs:** rental, catering, tax, gratuity, etc. The Wake Forest Clubs Program aims to break even on each club event. Therefore, accurate attendance and cost estimates are very important.

- II. **Inform the Alumni Services Office as Event Planning Begins** (4 – 8 weeks in advance)
 - a. **Provide Alumni Office with event specifics:** date, time, location, type, cost, communication plan
 - b. **Arrange for the Alumni Office to send out email announcements:** give the Alumni Services Office a heads up a minimum of 1 week in advance for any email invitations that you will desire to be sent out

- III. **Alumni Office responsibilities**
 - a. **Sign contracts:** contracts for WF events must be approved by the Alumni Office
 - b. **Invitations:** communication will be sent by the Alumni Office; if your club leverages Facebook/LinkedIn, then create event announcement on those platforms as well for distribution
 - c. **RSVPs:** event registration will take place on the WF Clubs site unless alternate arrangements are made
 - d. **Name tags & giveaways:** materials will be mailed to Clubs in early Fall to distribute accordingly; if additional supplies are needed, please contact the Alumni Office

- IV. **Local Club responsibilities**
 - a. **Liaison:** the event host/volunteer will be in continuous contact with the Alumni Office
 - b. **Communication:** club volunteers will encourage attendance by leveraging personal network
 - c. **Payment:** notify the Alumni Office 24 hours in advance of event for direct payment to vendor
 - d. **Invoices:** can be emailed, faxed or mailed to the Alumni Office immediately following event for payment



- e. **Reimbursement requests:** can be emailed, faxed or mailed to the Alumni Office immediately following event for prompt payment; the Alumni Office must receive a signed copy of the receipt in order to process reimbursements; alumni requesting reimbursements for payment will also be required to fill out a W9 form as part of the reimbursement process
- f. **Attendee list:** club volunteer will log on to the Clubs site to download current attendee list: alumni.wfu.edu/clubs/cms/attendance.php; you may need to request a login and password from the Alumni Office

V. Day of event

- a. **At least 1 Club leader volunteer** should be at event location 45 minutes prior to event
- b. **Registration:** local club should provide one person to assist with registration
- c. **Actual attendee list:** updated attendance list and monies collected on-site should be sent to the Alumni Office
- d. **Photos:** take a few photos of a wide variety of attendees to publicize the success of the event. Photos can be posted on club website or club Facebook site.
- e. **Announcements**
 - i. **Volunteer Opportunities:** utilize this time to highlight areas of need within the club. The Alumni Office can update you on any specific needs for alumni engagement.
 - ii. **Update Information:** Encourage alumni to update their information on WIN and to encourage their alumni friends to do the same
 - iii. **Facebook, LinkedIn:** Wake Forest Alumni has a LinkedIn and Facebook page! Highlight this briefly so alumni can take advantage of social and networking opportunities with fellow Wake Forest alumni. If your club has a Facebook page, you might want to endorse this as well
 - iv. **Making a Gift:** This can be short and brief, but consider suggesting the importance of philanthropy in ensuring that students have the opportunity to enjoy the education all of our alumni enjoyed. Tuition only covers 70% of the costs associated with a Wake Forest education!

VI. Follow-Up

- a. **Send actual attendance to Alumni Office**
- b. **Synopsis:** send a brief summary of the event, successes, failures, and points of improvement within 2-3 days of event).
 - i. What went well?
 - ii. What will you do differently next time?
 - iii. Will you repeat this event?
- c. **Photos:** send any photos to the Alumni Office or upload onto Facebook!



EVENT SUMMARY

Athletics – Professional Baseball Game Outing Club: Atlanta

An outing to a professional sporting event provides social interaction for alumni of all ages. Many professional, minor league and college athletics teams offer group rates on seats, as well as pre-game hospitality areas where alumni can mix and mingle before cheering their team on to victory.

I. Set the event (4-6 weeks in advance) – date, time, and cost

Depending on the season, an alumni club could schedule an outing for a professional, minor league or college sporting event for baseball, basketball, football or hockey. Ideally, it is a wonderful idea if you can identify a professional or minor league sports team that has a Wake Forest alumna on the roster because it helps with overall marketing efforts, but most folks enjoy sporting events regardless.

You will need to check the team's website for home game dates and use those options during your planning process. Specifically for baseball, you may want to check on the home and potential visiting teams' rosters to see if any Wake Forest athletes are on the team; in the event that there aren't, there are a few other things to consider when selecting a date.

Typically weekday evening games have a lower attendance than weekend games, so it will be easier to secure tickets as well as discounts. You will also have more opportunities for hospitality type areas for pre-game receptions. In general, your options are:

- Attend only the game
 - Pros: most cost-conscious, easiest to plan
 - Cons: difficult for alumni to mix and mingle
- Attend only the game, but see if there are "all you can eat seats" at your ballpark which will provide discounts on food/drinks included with the ticket price
 - Pros: still cost-conscious, still easy to plan
 - Cons: still difficult for alumni to mix and mingle
- Have a pre-game reception in a rented, catered pavilion within the ballpark prior to the game
 - Pros: best overall experience
 - Cons: most expensive
- Have a bring-your-own-sandwich pre-game tailgate in one of the parking lots prior to the game
 - Pros: good overall experience
 - Cons: can be challenging for folks to find you in a parking lot unless you are very clear where you will be set up and how they can find you

Tip: If you have an alumna who can pull strings to get you a discount on a pre-game reception, this is definitely the most fun option. Otherwise, just plan a traditional group outing and encourage alumni to talk amongst themselves in the seats. You'll still have a great time!



The most difficult component of this event is distributing the tickets. Some teams will set up a group sales page where alumni can log onto the team's site, pay for their tickets within the group's seating area, and the team representative will email or mail the tickets directly to the purchaser. THIS IS THE BEST OPTION. If that isn't an option with your team, then you should see if Wake Forest can front the money for the tickets, have alumni register on the Wake Forest events page, and then the host can arrange the best way to get tickets to each alumni. With today's ticketing systems relying on emailed tickets, you will need to ensure that you can have "hard" tickets to either mail to attendees, leave at will call, or arrange a location in front of the ballpark for folks to meet the event organizer. The easiest option is to mail the tickets, although you will incur the postage cost yourself. Another option is to leave the tickets at will for each attendee; if you go this route, it will be imperative that you know the name of the alumni who will be picking up the tickets and they will be required to have photo I.D. in order to pick them up. You can try to arrange a meeting place before the game in front of the ballpark for people to meet you to get their tickets, but then you are stuck standing outside the ballpark waiting on people who are late for the game...experience says this is a backup plan that should only be implemented in dire circumstances. 😊

II. Inform the Alumni Office (4 weeks in advance at minimum)

Advise the Alumni Offices of the game date, time, cost, whether or not a pre-game party will be involved, as well as any directions for parking and/or ticket distribution for attendees. Determine up front whether the Alumni Office will be receiving payment or whether you will have attendees work directly with the team.

Tip: Stay on top of your attendee list. You will be required to pay for a minimum amount of tickets, so marketing/promotion of this event will be critical.

III. Alumni Office responsibilities

The Alumni Office will send email announcements about the event to local alumni and may collect payment from alumni who register for the event on the clubs website. Also, the Alumni Office provides blank name tags that should be used for the event.

IV. Local Club responsibilities

The local club representative is responsible for (i) arranging for tickets and any pre-game festivities with the team, (ii) providing information required for the invitations, (iii) encouraging attendance by alumni and other invitees (iv) distributing tickets and (v) acting as the host at the event.

V. Day of event

The host or host committee will be responsible for attending the game and ensuring that the event runs smoothly. For any tickets which have not been distributed prior to the game, the host



will need to make arrangements with attendees as to whether they will leave their tickets at will call or if they will meet in person outside of the gates to give them their tickets.

During the game, the host should try to encourage alumni to talk amongst themselves in the seats and start the wave if at all possible. Haha!

Remember to take photos at the event to post on the club's website or Facebook page.

VI. Follow-Up

Within one week after the event, report back to the Alumni Office with the number of attendees at the event and any other feedback you can provide. Let the Alumni Office know if the event was successful, and what tips you can provide for improving this type of event in the future.

Also, post your photos or a summary of your event online to help record the event for your club.

VII. Contact Information for Questions

For more information, contact Lisa Snodgrass (Atlanta Club) at lisa-snodgrass-95@alumni.wfu.edu or (770) 671-1967.



EVENT SUMMARY

Social - New Alumni Reception **Club: Palm Beach, FL**

The purpose of a new alumni reception is to introduce recent Wake Forest alumni to the local club and the network of alumni in the area. The event is an important service to new alumni who may be starting careers in a new area, or returning to their hometown after an absence, and gives them ready access to a network of Wake Forest graduates in the community. At the same time, the event provides an opportunity for older alumni to connect with recent graduates and find out what is happening at the university, which increases engagement and enthusiasm among alumni.

I. Set the event (8 weeks in advance at minimum) – date, location, and cost

The event should be scheduled sometime between the date of graduation (typically in early June) and the beginning of fall. Because recent graduates may travel during the summer, and because new alumni may not immediately provide their new addresses to the Alumni Office, an event at the end of the summer or in the early fall typically works best because these administrative matters are more likely to be completed.

The reception should be scheduled for a finite period of time (2 to 3 hours) to ensure that all alumni are in attendance at the same time and have ample opportunity to mingle. A reception may be held on any day of the week, but if your club's geographic reach is large it is better to schedule the event for a weekend to allow sufficient time for attendees to travel.

Because the purpose of the event is to welcome new alumni to the local club, the event could be held either at the home of an alumnus with sufficient space for a reception, or at an interesting local destination like a restaurant that would provide a separate space for the group to meet. A community clubhouse could also work if it is a suitable size; for a region with a relatively small number of new alumni, the space should not be too large to avoid feeling impersonal and overwhelming. Meeting space offered by a business could also work so long as the club leaders can make the space friendly and accessible. Depending on your area, a local park might also be a great venue, though it introduces risk of bad weather.

The event should be free to attendees (though at a restaurant a cash bar would be acceptable) so the host or host committee should use a location that does not incur any cost, and try to minimize the cost burden on the hosts. It is not critical to provide an elaborate offering of food or drink. A club makes a great impression on new alumni by giving them the opportunity to meet enthusiastic, welcoming local alumni. The focus of the event planners should be on creating a fun environment for interaction.

Tip: Our club, which typically has no more than 10 or 12 new alumni arriving each year, would hold a reception in late August or September, which is still summer in South Florida. Rather than holding an event at a restaurant or bar, we would choose to have it in a more intimate space like the home of a local alumnus. The event would be on a Sunday afternoon from 2 p.m. to 4 p.m.



Dress for our event is casual, and we encourage alumni to wear WFU gear. Our gracious hosts for the event provide light refreshments (various chips, veggies, and dips; cheese trays; wings; cookies and brownies) including non-alcoholic beverages (soft drinks, iced tea and water).

II. Inform the Alumni Office (8 weeks in advance at minimum)

At the same time that you are selecting the location for the event, you will need to obtain from the Alumni Office a list of all recent graduates who have relocated to the area. You may also wish to invite any other older alumni who are also new to your area. The information from the Alumni Office will identify the number and geographic location of your new alumni, which can help you in selecting a venue.

Once the date and location are set, advise the Alumni Office of the time and location selected by the club, including directions to the venue and information on parking availability, so that an email notification with pertinent details can be sent to all alumni in the region. The email will request that alumni RSVP for the event, to assist the hosts in planning for refreshments. Invitation emails should be sent approximately four to five weeks before the event, two weeks before the event and the week of the event.

Tip: Since the success of the event depends on having enthusiastic older alumni in attendance to interact with the new alumni, make sure that you obtain commitments from your existing club members to attend the reception.

III. Alumni Office responsibilities

The Alumni Office will send email invitations to local alumni and collect responses from alumni who register for the event on the clubs website. The Alumni Office also regularly provides each club with Wake trinkets (pompoms, beads, buttons, etc.) which can be used to decorate your venue and also given away to your attendees. Also, the Alumni Office provides blank name tags that should be used for the event.

IV. Local Club responsibilities

The local club representative is responsible for (i) identifying and securing the venue, (ii) providing information required for the invitations, (iii) encouraging attendance by alumni and other invitees and (iv) arranging for refreshments at the event.

V. Day of event

The host or host committee will be responsible for setting up the reception in the same manner as any other party, except make sure that you have a sign-in table where attendees can record their attendance and put on name tags. Decorate your venue with Wake Forest banners, flags and posters, and distribute the give-away items liberally.



At some point during the event, club leaders should recognize and thank the host or host committee, and announce any upcoming events that the club has planned. Also, encourage the new alumni to update their contact information with the university (if they have not already done so) so they are added to the mailing list for future events in the area – visit www.wfu.edu/alumni.

Remember to take photos at the event to post on the club’s website or Facebook page.

VI. Follow-Up

Within one week after the event, report back to the Alumni Office with the number of attendees at the event and any other feedback you can provide. Let the Alumni Office know if the event was successful, and what tips you can provide for improving this type of event in the future.

Also, post your photos or a summary of your event online to help record the event for your club.

VII. Contact Information for Questions

For more information, contact Shannon Bothwell (Palm Beach, Florida Club) at Shannon_Bothwell@alumni.wfu.edu or (561) 762-2135.



EVENT SUMMARY

Social – All Society/Sorority Luncheon Club: Atlanta

The purpose of an all society/sorority luncheon is to provide a social setting for Wake Forest Alumnae to reconnect with society/sorority sisters who live in their community and to provide an opportunity for women of all societies/sororities to once again proudly don their colors and badges! This event typically attracts ladies who graduated prior to the 1990s, so it is a great way to reach out to an oft-neglected demographic of alumnae. Wake Forest has a unique heritage and tradition of societies vs. sororities prior to the early 90's which is to be remembered and celebrated.

I. Set the event (8 weeks in advance at minimum) – date, location, and cost

This event can be held at any time of year; however, summer vacations and back-to-school events seem to cloud calendars. Immediately after the holidays or early spring seems to work well (January – March).

Depending upon the club's demographics, a weekday event could be considered. However, the best time to guarantee attendance is a Saturday afternoon.

Because the purpose of the event is to allow alumnae to mingle and socialize prior to lunch, it is best to research an interesting local restaurant that would provide a separate space for the group to meet. This allows attendees to greet each other and reminisce without blocking aisles/tables or disturbing other patrons within the restaurant.

Through experience, it seems like attendees prefer to have a price cap around \$25-\$30 per person for the luncheon. By checking with local restaurants, typically pricing for groups is negotiable.

Tip: Our club hosted our first luncheon this year to rousing success. The venue that was selected is a noted restaurant in Atlanta where many bridal luncheons, baby showers, etc. are held – it is widely recognized as a place where “ladies lunch”! Finding a popular venue that works within your price point will provide the best chance of a successful event.

II. Inform the Alumni Office (8 weeks in advance at minimum)

At the same time that you are selecting the location for the event, you will need to obtain from the Alumni Office a list of all local alumnae who were affiliated with a society or sorority during their time at Wake Forest.

Tip: Leverage the list of Greek alumnae to identify a member of each society/sorority to assist in public Services efforts for the event. Contact those women ahead of time and see if they would be involved on the planning committee for the event. As a “hostess” for their society/sorority, their responsibilities will entail contacting local members of their Greek organization to promote the event, attend the event, and assist with set-up and clean-up responsibilities (if needed). Attendance



is boosted for this event when a personal call/note/email from one of their “sisters” is sent out as it assures them that they will not be the only member from their society/sorority in attendance.

Once the date and location are set, advise the Alumni Office of the time and location selected by the club, including directions to the venue and information on parking availability, so that an email notification with pertinent details can be sent to all alumni in the region. The email will request that alumnae RSVP and pre-pay for the event, to assist the hosts in finalizing the head count with the restaurant. Invitation emails should be sent approximately four weeks before the event and a reminder closer the event.

Tip: For a fun twist on your event, ensure that you invite the ladies to wear their society/sorority colors and badges/pins, etc. Most ladies haven’t worn their badges/pins in year, so it is a nice touch!

III. Alumni Office responsibilities

The Alumni Office will send email invitations to local alumni and collect responses from alumni who register for the event on the clubs website. The Alumni Office can provide you with Wake trinkets (napkins, pens, koozies, and banners) which can be used to decorate your venue and also given away to your attendees. Also, the Alumni Office can generate nametags with each attendee’s name and society/sorority to send to you ahead of time, along with blank name tags for last minute registrants.

The Alumni Office is happy to work with you to arrange payment directly with the venue. Typically attendees will register and pre-pay through the Wake Forest Clubs website, so you are not responsible for collecting payment. If you provide the Alumni Office with the name and phone number for your venue contact, they will contact the venue directly to arrange for payment prior to the event so that you do not need to settle up with personal funds.

IV. Local Club responsibilities

The local club representative is responsible for (i) identifying and securing the venue, (ii) providing information required for the invitations, (iii) encouraging attendance by alumni and other invitees and (iv) working with the Alumni Office to arrange for payment to the venue.

V. Day of event

The hostess or hostess committee will be responsible for arriving early at the restaurant to make sure everything is arranged in your private space. You can then take a few moments to have Wake Forest banners, put out any Wake trinkets at each place setting, and set up a sign-in area where attendees can record their attendance and put on name tags.

Ahead of time, arrange for one of the hostesses to kick-off the luncheon with opening remarks, noting each of the societies/sororities that have alumnae in attendance, providing the group with any updates on Greek Life that you might have received from the Greek Life Office, etc. If you have an Alumni Council member in attendance, arrange for her to give a quick update on the



state of the university as well. Close your remarks with announcements about any upcoming events that the club has planned and invite everyone to enjoy their lunch.

Remember to take photos at the event to post on the club's website or Facebook page.

Tip: The Alumni Office can give you a contact within the Greek Life Office. I contacted Greek Life ahead of the event and asked for an update on how many/which sororities are currently on campus (and which of those were originally societies), what the average GPA is for a Greek woman vs. the all-campus average, current housing trends (do sisters still have hallways, do they have houses now, etc.) as well as trivia questions to ask at the luncheon (i.e. what was the first society on campus? What was the first sorority on campus?). I used this information in my opening remarks to greet everyone at the luncheon once they were seated and everyone was fascinated to hear the updates from campus.

VI. Follow-Up

Within one week after the event, report back to the Alumni Office with the attendees at the event and any other feedback you can provide. Let the Alumni Office know if the event was successful, and what tips you can provide for improving this type of event in the future.

Also, post your photos or a summary of your event online to help record the event for your club.

VII. Contact Information for Questions

For more information, contact Lisa Snodgrass (Atlanta Club) at lisa-snodgrass-95@alumni.wfu.edu or (770) 671-1967.



EVENT SUMMARY

Social – Big 5 Alumni Mixer **Club: Atlanta**

The purpose of the Big 5 Alumni Mixer is to provide Wake Forest Alumni the opportunity to interact with alumni from other universities. These mixers are a great way to extend Wake Forest spirit and enthusiasm across peer institutes while mixing with a cross-section of your market/region in either a social or professional networking-type setting.

This specific event example is geared toward young alumni happy hours. In Atlanta, the identified “Big 5” alumni groups typically host events 3 times a year – a Spring happy hour, a summer baseball outing, and a winter holiday party. Our “Big 5” consists of Wake Forest, UVA, Duke, UNC and Vanderbilt; however depending upon your region you may find that you prefer to host mixers with only 1 or 2 other alumni groups at a time, or you want to change it up throughout the year as opposed to creating a specific set of alumni with whom to interact, or you only want to include ACC schools, etc. There is no right or wrong way to mix with other alumni groups!

Tip: You want to be careful of including schools which are based in your hometown purely from an attendance numbers point of view. For instance, in Atlanta we seldom invite the UGA or GA Tech alumni clubs to participate in our events because their alumni would completely overrun the number of alumni we would have in attendance. Invite schools to participate which have some commonalities to Wake Forest to make it easy for alumni to mesh with each other. We have also done one-off mixers with the University of Richmond, Virginia Tech, NC State, Emory, Florida State and Harvard. Each was fun and successful in its own way.

I. Set the event (8 weeks in advance at minimum) – date, location, and cost

Because the purpose of the event is to allow alumni from all schools to mingle and socialize, it is best to find a popular bar/restaurant where folks can either pay at the bar on their own or you have alumni pre-pay for drink tickets and provide wristbands at the door. If you establish your own “Big 5” or something similar, then each school should take the lead on event planning in an alternating fashion. This allows for each group to only have to plan 1 out of every 5 events.

Tip: Encourage each school to have a registration table available for name tags, trinkets, cups, etc. and encourage alumni to wear identifying school colors or shirts, etc. Name tags are really the key to this event; having each alumnus wear a name tag from their own school helps folks identify who belongs to which university to ease in socializing/networking. Also, if each school can send cups from a favorite bar/restaurant in their town, that makes it even more fun for attendees.

II. Inform the Alumni Office (8 weeks in advance at minimum)

If the event is geared toward young alumni, have the Alumni Office only send the email invitation for the event to alumni who have graduated in the last 10 years.



Tip: Within the email invitation, play up the fact that Wake Forest wants to have strong representation at the event and they should proudly wear black & gold!

III. Alumni Office responsibilities

The Alumni Office will send email invitations to the young alumni and collect responses from alumni who register for the event on the clubs website. The Alumni Office can provide you with nametags as well as Wake trinkets (napkins, koozies, and banners) which can be used to decorate for the event.

IV. Local Club responsibilities

The local club representative is responsible for (i) contacting other alumni club presidents with whom you'd like to plan an event (ii) identifying and securing the venue, (ii) providing information required for the invitations, (iii) encouraging attendance by alumni and other invitees.

V. Day of event

The host from each school should be responsible for arriving early at the bar/restaurant to make sure everything is set up properly. If you need to distribute wristbands, ensure that you have the attendee list from Wake Forest as well as the other schools. Encourage the other schools to bring banners to decorate accordingly.

Remember to take photos at the event to post on the club's website or Facebook page.

VI. Follow-Up

Within one week after the event, report back to the Alumni Office with the attendees at the event and any other feedback you can provide. Let the Alumni Office know if the event was successful, and what tips you can provide for improving this type of event in the future.

Also, post your photos or a summary of your event online to help record the event for your club.

VII. Contact Information for Questions

For more information, contact Lisa Snodgrass (Atlanta Club) at lisa-snodgrass-95@alumni.wfu.edu or (770) 671-1967.



EVENT SUMMARY

Service - Food Bank Volunteer Service Event **Club: Charlotte**

Volunteering at a local food pantry/bank is a great way to support Wake Forest's Pro Humanitate ideals and to bring area alumni together to connect and give back to their local community. Service activities can be difficult to execute with an alumni group because individuals are obviously volunteering their time and you don't have the "hook" of prepayment to encourage everyone who registers to show up. It is vitally important that the volunteer event is not entirely dependent on the number of participants who attend and with this type of event, there is flexibility. This event can be successful with anywhere from 5 to 30 volunteers and because as you are typically working in close quarters, it gives alumni a chance to connect and interact with one another throughout the activity.

I. Set the event (Typically 6-8 weeks in advance)

- Contact the organization to understand the volunteer opportunities that exist and to select a date and time.
- Some food banks fill their volunteer slots up to 2 months in advance so reach out early if you have specific dates in mind that work best for your market.

Tip: Our club has had great success with scheduling this event on Saturday mornings from 9am to noon. It is early enough that it allows people to volunteer and still have the majority of their weekend available. It also facilitates making this a family event with kids and parents volunteering together. Verify that kids are allowed to participate but at our local food bank in Charlotte, they welcome kids over 8 years old to volunteer alongside their parents. Some schools have volunteer requirements for their students so this activity provides a great way for students to fulfill their service obligations and our local food bank is very comfortable with signing the requisite paperwork at the end of the day.

II. Inform the Alumni Office (Once the date has been set)

- Add this to the local club's calendar of events and send a "save the date" announcement if appropriate.
- We suggest sending the registration announcement approximately three weeks in advance but this timing is flexible depending on your local market.
- With a three week notice, you can provide 10-12 days for registrations to flow in and then assess whether a reminder is necessary.
- Close registration three to four days prior to the event so that you can confirm the count with the food bank. Once they know the number of participants, they may be able to provide more specifics on the activities in which you'll be engaged (e.g., sorting and inspecting food/cans, preparing bags of foods for kids and seniors, etc.).



- If you are still interested in securing additional volunteers, you can update the event details with a note to email the event lead if interested in participating. This ensures that no one slips through the cracks at the last minute and misses any logistics or detailed information that you send to those who had already registered.

Tip: When sending out the registration announcement, encourage alumni to bring their children (assuming the food bank allows them to participate). Also stress that individuals should sign up only when they are relatively sure they can participate and honor the commitment as you do not want to provide the organization with a volunteer count that is not fairly accurate. You may experience some attrition but this approach along with a reminder to those registered (3 days before the event) usually keeps attrition at a minimum. In the reminder, be sure to share any dress requirements (e.g., must wear close-toed shoes, may want to bring a jacket as it can be chilly inside, etc.) and encourage people to wear Wake Forest paraphernalia. It is always great to promote our University and it looks great if you are taking photos of the activity. We've done this event in Charlotte twice and had attendance between 20-30 alumni each time.

III. Alumni Office responsibilities

This event is primarily coordinated locally. The Alumni Office serves the typical function that they do for most events in terms of managing the registration process. If there is a limit or desired number of participants that the food bank can support, be sure to let the Alumni Office know so they can help in monitoring the registration count.

IV. Local Club responsibilities

The local club representative is responsible for selecting the date, composing the announcement, monitoring registrations and encouraging attendance, and providing a club representative on the day of the event.

V. Day of event

- Arrive at the food bank early to coordinate arrivals and to greet alumni. If the food bank does not provide nametags (our local food bank does), secure them in advance and ask participants to wear them throughout the event.
- Depending on the size of the group, the club representative can facilitate introductions and encourage the social aspect of the event.
- Bring a camera and take a few pictures throughout the event to post on the club's website and/or Facebook page.

Tip: In Charlotte, this event tends to bring out a different/new population than our typical event attendees. If this occurs in your local market, use them as a mini focus group. Network with them,



ask their opinion about future activities they would like the club to sponsor, and encourage their ongoing future participation.

VI. Follow-Up

After the event, a follow up email to the participants thanking them for their time is appropriate. You can also include a link to the photos that were taken and encourage them to attend future club events and/or send you ideas for other events.

VII. Contact Information for Questions

For more information about one club's experience about selecting a volunteer event and specifically organizing a food bank volunteer activity, contact Rosalyn Frazier (Charlotte, NC club) at rosalyn-frazier-93@alumni.wfu.edu.



EVENT SUMMARY

Professional & Intellectual Development - Wake Forest Faculty Event Club: Palm Beach, FL

Wake Forest faculty members often travel for conference attendance or other work responsibilities. A faculty member visiting the area served by a club is an excellent opportunity to bring a “mobile classroom” to alumni and create a lifelong learning opportunity.

I. Set the event (6 weeks in advance) – date, location, and cost

The most challenging aspect of this program is obtaining information about the travel schedules of faculty members. If a club is located in an area that hosts a large number of conventions, or in a college town, club leaders may wish to investigate the events calendars of local institutions to identify programs at which Wake Forest faculty members are speaking. Club leaders may also learn about faculty visits to the area from university sources, such as news releases, and from the websites of faculty members.

Once a club becomes aware of a faculty visit, club leaders should contact the faculty member to confirm their willingness to participate in a club event. The date and time of the event will typically be set by coordinating directly with the faculty member, keeping in mind that the time should be selected with an eye toward maximizing alumni participation. In a community where most alumni work, a time after work or on the weekends makes the program accessible for more alumni.

The venue should offer both a place to hold a reception prior to the talk and a location for the faculty presentation that includes PowerPoint projection capabilities. Consider the size of the local club and anticipated attendance in selecting a location. The location should have suitable acoustics for a lecture and for a lively reception. Once a venue is selected, the local club can elect what refreshments will be available for the reception. Typically a club will arrange for catering for a light reception (beer / wine / appetizers) prior to the event.

Each club even should be self-funding, so the cost of attending a faculty event should be based on the cost of the reception and any venue cost. The Alumni Office will handle payments through the university’s website when alumni sign up to attend the event.

Tip: Our club held a successful faculty lecture on a Monday evening, with the reception beginning at 6:00 and the presentation beginning at 6:30. Our faculty presentation was approximately 30-35 minutes in length, with a question and answer period lasting 15-20 minutes. The event took place at our historic county courthouse, with the reception occurring in open space in the first floor foyer area and the faculty presentation occurring in the historic courtroom. Other venue options would be community meeting space in public buildings (though public spaces may limit the ability to bring in food or alcohol), and conference or meeting rooms in convention centers, arts centers or at local businesses. Local clubs should consider making use of the business and charitable contacts of



their members to secure a suitable space. Our relatively small club (500 local alumni, parents and friends) had approximately 25 people attend our faculty event.

II. Inform the Alumni Office (5 weeks in advance at minimum)

Advise the Alumni Office of the time and location selected by the club, including directions to the venue and information on parking availability, so that an email notification with pertinent details can be sent to all alumni in the region. The email will request that alumni RSVP for the event, and the online registration process will require payment of the charge from each registering attendee. Alumni invitation emails should be sent approximately four weeks before the event and a reminder closer to the event.

Also, the local club should be available to assist the faculty member in any travel arrangements or questions about visiting the area. Depending on the travel schedule of the faculty member, the executive board of the local club may also have the opportunity to host the faculty member for a dinner or lunch before or after the presentation.

Tip: The local club point person for the event should be able to recommend nearby hotels, restaurants, and other local amenities for the visitors. Also, coordinate with the Alumni Office to make sure that multiple invitation emails are sent, and to monitor registration for the event. The local club representative should actively solicit registrations from club members to ensure that the event is well attended.

Spouses and older children are welcome to attend a faculty event. It is also a great way to showcase the university to guidance counselors at local schools or to prospective students, so consider forwarding the invitation to any of your community contacts as well.

III. Alumni Office responsibilities

The Alumni Office will (i) send email invitations to local alumni and, (ii) collect responses from alumni who register for the event on the clubs website.

IV. Local Club responsibilities

The local club representative is responsible for (i) identifying and securing the venue, (ii) arranging for any catering services for the event, (iii) providing information required for the invitations, (iv) monitoring registrations and encouraging attendance at the event by reaching out to local alumni and (v) transmitting invoices for services to the Alumni Office.

Tip: The three critical tasks for the local club are selecting an appropriate venue (with the correct size, location and price), selecting the refreshments for the event, and ensuring good attendance at the event so the investment of time by the faculty member is worthwhile.



V. Day of event

At least one club leader should be at the venue at least 45 minutes prior to the event to assist with setup and meet the faculty member. The local club leaders should assist with welcoming attendees and ensuring a lively reception.

A representative of the local club should introduce the speaker. Also, be sure to recognize any club leaders who have been instrumental in organizing the event, and announce upcoming club events. Remember to take photos at the event to post on the club's website or Facebook page.

VI. Follow-Up

Since most participants have previously registered and paid for the event, the local club generally has little trouble keeping track of attendance. After the event, report back to the university regarding the event, including attendance, results, and recommendations or tips for other clubs. The club should make appropriate gestures to thank the visiting faculty member, as well as any club members or other persons who assisted with the event. Also, post your photos or a summary of your event to help record the milestone for your club.

VII. Contact Information for Questions

For more information about one club's experience hosting a faculty event, contact Shannon Bothwell (Palm Beach, Florida Club) at Shannon_Bothwell@alumni.wfu.edu or (561) 762-2135.

Other clubs that have hosted faculty events:

Charlotte, NC

Rocky Mount, NC

Raleigh, NC

Jacksonville, FL

Atlanta, GA

Greensboro, NC