

**ASSOCIATION OF YALE ALUMNI
YALE COLLEGE CLASSES
MINI REUNIONS – A “HOW TO” GUIDE**

WHAT ARE MINI REUNIONS?

These classmate-organized events average two to four days and are held in a variety of locations around the country and around the world. Mini reunions offer a wonderful opportunity to broaden classmate involvement, and frequently draw a different segment of the class than 5-year reunions or other regular class events such as dinners in New York City. AYA provides some support for mini reunions; **please contact Karen Jahn (203/432-1954 or karen.jahn@yale.edu) for more information.**

Volunteers have organized a wide variety of activities as part of mini reunion programs, a small sample of which are listed below. Many of these programs take advantage of the connections and talents of local classmates or other alumni in the area. Details and other suggestions are available from AYA.

- Lunch or dinner in special or unusual locations
- House and garden tours (Charleston)
- Architectural boat tours (Chicago)
- Theater, opera, and other cultural events
- Pueblo walking tours (Santa Fe)
- Tours of government buildings (Washington DC)
- Skiing (Jackson Hole)
- River-to-river Victorian trolley tour (Philadelphia)
- Wine tour (Napa Valley)
- Cave temple tours (Bombay, India)
- Mississippi boat tour (New Orleans)
- Palace tours (London)
- Class discussions or classmate speaker

WHY SHOULD MY CLASS HOLD A MINI REUNION?

In the words of veteran organizer David Acton, Secretary of the Class of 1955, “since the beginning, mini reunions have generated a feeling of cohesiveness and increased camaraderie among classmates. Attendance grows with each successive mini reunion. We have experienced increases from 25 to 30 percent from one event to the next. I once suggested that perhaps we should only hold one, not two mini reunions, between our five year reunions in New Haven. The suggestion was met with great protest.” Attendance at these Class of 1955 events has grown to the point where David no longer calls them “mini.” Their last “reunion” in Philadelphia attracted over 180 classmates and guests.

OK, YOU’VE CONVINCED ME. HOW DOES MY CLASS GET STARTED?

After polling some of our most experienced volunteers, the AYA has assembled the following list of “best practices.” These are considered by volunteers to be the key ingredients for a successful mini reunion.

- Choose an interesting location
 - Recruit strong local classmate organizers
 - Publicize well in advance (nine months to a year) and include as much detail about program and logistics as possible
 - Plan an interesting and varied program
 - Utilize local expertise and connections
 - Develop a realistic budget, including planning for contingencies
 - Offer reasonable pricing with provisions for local classmates to attend and pay for part of the weekend
 - Take advantage of the expertise of past organizers from other classes, a valuable resource
1. When **choosing a location**, keep in mind the following:
 - Will your classmates have difficulty getting there?
 - Are there enough local facilities (including hotel space) to accommodate your group?
 - Regarding the date, are there other large events taking place at the same time that might be competing for limited facilities?
 2. A **strong local organizer** can make the difference between a good event and a truly memorable one. Whether the Class chooses to form a committee, tap an individual, hire a local tour operator, or do a combination, the duties are the same:
 - Develop program of events and meals
 - Select locations for events, including tours, restaurants, meeting and lecture spaces
 - Reserve a block of hotel rooms and negotiate a group rate for classmates. Actual reservations should be made by each individual attendee.
 - Arrange for transportation to and from venues where appropriate.
 - Determine all anticipated expenses (including fees for catering, bar and room rental, buses, tour guides, gratuities, decorations, souvenirs, and entry fees for specific events) and draft a budget. Decide on package or a-la-carte prices that cover all expenses. (*Note: class events should be priced to break even (with the exception of mailings, which are paid out of the class treasury) unless previous arrangements have been made with both class officers.*)
 - Create save the date and/or registration mailings. AYA can provide samples and help.
 3. **Publicizing your event** should begin as soon as the location and dates are confirmed. While we recommend sending a save-the-date mailing (with a postcard response) nine months to a year in advance, starting earlier is fine. AYA analysis of attendance data indicates a significant decrease in participation when notice is given less than six months from the event. The actual registration mailing should be mailed four to six months in advance. Your classmates are all as busy as you are!

The registration mailing itself should include as much detail as possible about program and logistics. Examples include: a full description of the program's highlights, overall pricing and costs for add-on activities that are not included in the registration fee, hotel information and reservation deadlines. The AYA can provide guidance and samples. Please see the detailed information in the "IT'S TIME TO SEND A REGISTRATION MAILING" section below.

4. While spending time with each other is the main reason your classmates will sign up for a mini reunion, don't underestimate the importance of a **strong program**. When scoring Yale Colleges Reunions via the AYA's post reunion survey, alumni often rate the educational portion of the weekend higher than meals and social events!

The goal should be to offer a program with a variety of educational, cultural and social events while building in some free time for participants.

The responses from the save-the-date mailing will help guide your venue choices and aid in developing your program. While a specific tour or meal venue may work well for a group of 50, it may be unrealistic or even impossible for a group of 100.

5. It is no secret that Yale alumni are among the most interesting, talented and well-connected people in the world. Take advantage of this! Work with your **classmates** (local and otherwise) to offer opportunities not available to the average traveler. Classmate talent and connections have taken many shapes:
 - A dinner at the Getty Museum hosted by museum director/classmate
 - Tour led by local historian/classmate in Santa Fe
 - Dinner at a South Carolina plantation owned by Yale alumnus
 - Dinner and a NYC Broadway show produced by Yale classmate
 - Panel of classmate Ambassadors

The list goes on, and your class will come up with new and exciting additions.

6. Before setting a cost for the mini reunion, a **realistic budget** needs to be developed based on estimated costs and attendance. Be sure to include ALL expenses: transportation, tips, taxes, rental fees, printing costs, signs, guides, tour operators etc. If the Class chooses to offer payment by credit card, **please be aware that credit card companies charge a 3% fee which will be deducted by AYA from income received.** These charges should be considered when budgeting for an event. We also suggest you include a contingency amount for unanticipated expenses, such as having to change a venue at the last minute or add an additional tour guide because of higher turnout.
7. Once a budget is set, you can **determine the pricing**. When estimating attendance for the purpose of setting fees, use a lower estimate. For example, if your save the date responses indicate 90 people are interested, you are better off setting the price based on final attendance of 75 rather than 100. This will cover a shortfall if attendance is less than expected. *If the Class officers have decided to underwrite the cost of the mini reunion on a per person basis, remember that the higher the attendance, the higher the contribution from the Class will be.*
8. Over the last decade, classes have held mini reunions throughout the country and around the world. The AYA has begun gathering reports from organizers that are available for volunteers to review. **The most valuable resources, however, are the experienced volunteers themselves.** The AYA can put you in touch with alumni who have organized a mini reunion in the same location, who are members of a class in the same life stage, or who have planned multiple events and have a wealth of knowledge and experience to share.

OK, NOW I KNOW WHAT THE CLASS HAS TO DO, HOW CAN THE AYA STAFF HELP?

For mini reunions held outside New Haven, AYA staff can help in the following ways:

- Provide location suggestions and/or put organizers in touch with other alumni who have planned similar events
- Advise organizers on the planning process and timelines

- Work with volunteers to create and send save the date and registration mailings to all classmates and friends of the class. The AYA's ability to send follow-up mailings to individual attendees is extremely limited and depends upon the department's current workload. Please check with the AYA in advance of planning follow up mailings.
- Track participant registrations and payments (with some exceptions). If the AYA is tracking the event, you will receive weekly updates, most commonly via email or fax.
- Send deposits and final payments to vendors (see financial guidelines listed below).
- Reimburse volunteers for **documented** out-of-pocket expenses.
- Provide final accounting of income and expenses.

For mini reunions held at the University, AYA staff can also assist with room and facility reservations, A/V rentals and faculty speaking requests, as well as coordinating any on-campus catering needs.

IT'S TIME TO SEND A REGISTRATION MAILING. WHAT SHOULD IT INCLUDE?

Although the typical registration mailing goes out approximately four to six months in advance of the event, the timing is often driven by the room release date for the hotel block reserved. Past experience has shown that attendees prefer to know the actual cost of the event when reserving their hotel room; we **strongly** recommend that the complete registration mailing go out prior to the hotel release date. The AYA is happy to provide sample mailings for inspiration.

The registration mailing should include the following information:

- Schedule of events (as complete as possible, including meeting times and locations)
- Location information, including any special advice on average temperatures, dress code, transportation to hotel, etc.
- Any deadlines regarding sign-ups or cancellations
- First-come first-served warnings if any events have an attendance limit
- Hotel reservation information, including reservation & cancellation deadlines
- Payment information including any fee breakdowns for partial attendance or costs for add-on events not included in the full fee
- Sign-ups for individual events for planning purposes such as dinners or bus trips
- Return addressed envelope
- The registration form itself should include space for participants to provide complete contact information in case there is a change in the schedule and any additional information needed for special events.
- Classmate and AYA contact information for questions

I'VE STARTED MAKING RESERVATIONS AND MY VENDORS NEED TO BE PAID...

There are several ways to handle mini reunion finances, depending on how the event is organized and the turn-around time for vendor payments.

1. When using a tour operator, individual participants should pay the tour operator directly rather than sending payments to AYA or to the volunteer.
2. A volunteer can track registrations and payments by opening a temporary checking account in the name of the class. All receipts can then be deposited into this account, and all expenses paid from it. If a class chooses to do this, a final accounting must be forwarded to the AYA to have on record for

IRS purposes. **Because it takes the University approximately three weeks to process a payment from the time an invoice is received, this method should be used if a class anticipates having to process last minute payments to vendors.**

3. The AYA can receive and track registrations, deposit fees and pay vendors.

WHAT DOCUMENTATION DO I NEED IN ORDER TO GET REIMBURSED OR TO PAY A VENDOR?

To avoid being taxed as income, the IRS requires that all reimbursements be accompanied by receipts or proof of payment (such as a credit card statement or copy of check). These are Federal requirements and the University has no latitude.

Invoices (the University cannot pay on a statement) submitted by vendors or individuals must include their Federal Tax identification number (EIN) or social security number, address and telephone number.

It takes approximately three weeks for the University to process a payment once it is received. Please keep this in mind when requesting deposits and payments.