VUAA Scholarship Fundraising Event Guidebook
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**Introduction**

The VUAA Scholarship Program has been in existence for over 20 years. Since its inception, the program has awarded more than $500,000 to Villanova students from across the country.

VUAA Chapters/Affinity Groups partaking in the scholarship program are tasked with hosting an annual fundraising event that raises significant dollars for their designated Scholarship Fund, which is established and managed through the Office of Alumni Relations. The goal of these events is to raise significant scholarship funds, provide a unique Villanova Experience, and strengthen the network of alumni, parents and friends.

In order to receive University support, participating Chapters/Groups must read through and abide by the guidelines outlined in this book. Scholarship fundraising events are a large investment of time and resources from both the Chapter/Group and University, and these guidelines help to clarify and streamline the process for all.

Should you have any questions, please contact your Alumni Relations staff liaison or contact the Office of Alumni Relations at alumni@villanova.edu or 1-800-VILLANOVA.
Support from the University

Scholarship fundraising events are Chapter/Group-driven, University-supported events. All Chapters/Groups must receive VUAA approval of event date and location prior to any additional planning. Once approved, two (2) University Advancement staff members will be assigned to assist with the coordination and execution of the event: an Alumni Relations staff lead and a Special Events Team lead. Specific responsibilities of the University staff vs. Chapter/Group are outlined below.

Specific functions of University staff (with input from Chapter/Group):
- Create and print event invitation and program.
- Mass email marketing to local Villanova community (alumni, parents, friends).
- Review and sign event contracts.
- Create online event registration site.
- Create online auction bidding site, if applicable.
- Collect event registration/sponsorship money (by credit card online or checks by mail).
- Provide committee with timely RSVP reports.
- Provide staff support at the event.
- Provide event signage, supplies and decorations as needed.
- Secure and coordinate involvement of special guests from the University.
- Assist committee with securing giveaway/raffle/auction items from the University.
- Provide giveaways for participants.

Specific functions of Chapter/Group:
- Recruit event attendees.
- Solicit local sponsors to provide a financial contribution, auction items or to underwrite other fundraising components of the event.
- Plan and execute additional fundraising activity (raffle, silent auction, live auction, etc.)
- Secure Fair Market Value (FMV) of all auction items and provide certificated of authenticity when applicable prior to the event. Fair Market Value must be displayed prominently alongside all auction items.
- Arrange publicity of event through social media and personal outreach.
- Recruit and train volunteers to assist during the event.
- Set entry fees and price points in consultation with the Office of Alumni Relations.
- Develop and adhere to event budget.
Scholarship Event Requirements & Selection

Keep these requirements in mind when choosing the scholarship fundraising event model that will work best for your Chapter/Group demographics and needs. Ask the following questions before deciding on an event:

- How much money do we need/want to make?
- What groups/people are we targeting?
- Realistically, how much manpower do we have available to plan this event?
- How much additional risk can we afford? Money, time, energy?
- Is this a project that could be held and sustained on an annual basis?

<table>
<thead>
<tr>
<th></th>
<th>Golf Events</th>
<th>Non-Golf Events</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fundraising Goal</strong> (to be met by year 3 of event)</td>
<td>$20,000+ per event</td>
<td>$10,000+ per event</td>
</tr>
<tr>
<td><strong>Committee Members</strong></td>
<td>18-30 alumni, parents, friends</td>
<td>10-20 alumni, parents, friends</td>
</tr>
<tr>
<td><strong>Planning Timeline</strong></td>
<td>8-10 months in advance</td>
<td>8-10 months in advance</td>
</tr>
<tr>
<td><strong>Printed Invitation</strong></td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Printed Program Booklet</strong></td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Email Marketing</strong></td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Online Registration Page</strong></td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Online Auction Bidding Site</strong></td>
<td>Yes, promoted to Chapter/Group definitions</td>
<td>Yes, promoted to Chapter/Group definitions</td>
</tr>
<tr>
<td><strong>Tax Receipts</strong></td>
<td>Provided to attendees/auction winners who pay over Fair Market Value (FMV) + sponsors</td>
<td>Provided to attendees/auction winners who pay over Fair Market Value (FMV) + sponsors</td>
</tr>
<tr>
<td><strong>Staff support at event?</strong></td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Giveaways provided to participants?</strong></td>
<td>Yes, items pre-determined by University</td>
<td>Yes, items pre-determined by University</td>
</tr>
<tr>
<td><strong>Networking Component</strong></td>
<td>Required dinner after golf that is open to non-golfers</td>
<td>Unscripted time for networking</td>
</tr>
<tr>
<td><strong>Dinner/Speaking Program Length</strong></td>
<td>Under 2 hours</td>
<td>Under 2 hours</td>
</tr>
<tr>
<td><strong>Scripted Program</strong></td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Sources of Revenue

In order to meet the fundraising goals for scholarship events, Chapters/Groups must look to other sources of revenue outside of ticket sales to raise money. While ticket sales should exceed the overhead, they are certainly not (and should not) be the only source of revenue at the event.

Additional sources of revenue to consider:

- Sponsorships – for food, beverages, ads, etc.
- Auction – live, silent or both
  - Look for variety of items that would appeal to different people.
  - Stress quality over quantity; 20-30 auctions items is appropriate.
  - Look for items that have local appeal (sporting/cultural events, concert tickets, etc.)
  - A great MC is required for a live auction.
  - Provide inspiration for bidding - 100% of proceeds go toward scholarship!
- Raffle Tickets – raffle off small gift cards or gift baskets from local stores/restaurants.
  - Example: sell 1 ticket for $10 or 2 tickets for $20
- Premiere Raffle – sell a limited number of high price raffle tickets for monetary award.
  - Example: sell 300 tickets at $100 each = $30,000 – $10,000 goes to winner, $20,000 goes toward scholarship.
- Golf-centric items
  - Hole sponsors – Example: 18 holes @ $1,000 each = $18,000
  - Mulligans – Example: $20/golfer or $60/foursome
  - Putting/on-course contests

Payment & Reimbursement Information
The University will pay for all event deposits and expenses. Chapters/Groups are asked NOT use personal credit cards, as reimbursement checks take a minimum of 4-6 weeks for the University to process.

Should you need a reimbursement, please fill out a Reimbursement Request Form (found in the Appendix) and submit to your Alumni Relations staff liaison along with itemized receipts. If you donated an item and wish to receive Gift in Kind credit, please submit a Gift In Kind Form (found in the Appendix) and submit along with itemized receipts and proof of payment to your Alumni Relations staff liaison.

Gift Credit & Fair Market Value
The amount of the donors’ contribution to the event that is deductible for federal income tax purposes is limited to the excess of money (and the fair market value of property other than money) contributed over the value of goods or services provided by the organization.

When running an auction, the Fair Market Value (FMV) of each item must be listed prior to the auction taking place and on all supporting documents (webpage, bidding sheet, program, etc.). The purchaser will receive a tax receipt for the amount paid above FMV. If FMV is not listed, then none of the payment will be considered as a gift, per IRS. Raffle ticket purchases are not tax deductible as a charitable contribution, since they are considered by the IRS as a game of chance (either a gambling loss or gain).
Committee Structure

To help ensure a successful scholarship fundraising event, we recommend each Chapter/Group creates both a Steering Committee as well as an At-Large Committee that will support the event in different capacities. In total, you should recruit at least 18 volunteers for golf and 10 for non-golf events.

**Steering Committee (5-10 volunteers)**
The Steering Committee will schedule, plan, coordinate and oversee all phases of the event. Each committee member should be assigned the responsibility of carrying out specific tasks necessary for the planning and execution of the event. Tap into the various professional skills of your volunteers when determining their specific leadership responsibilities.

The Steering Committee should include:
- Committee Chairperson(s)
- Chapter/Group President
- 3-7 additional volunteers (VU alumni, parents, friends)

**At-Large Committee (10-20 volunteers)**
The most successful scholarship fundraising events are those that have sizeable committees behind them. When looking to recruit At-Large Committee members, we recommend looking for Villanova alumni, parents and friends who are leading philanthropist, business or professional members of the community that will help lend credibility and prestige to your event. Fill your committee with well-to-do or well-placed people, and they will recruit the same. The Office of University Advancement can assist with the identification of potential At-Large Committee members from your Chapter/Group definition.

At-Large Committee members are asked to do a very small part to help guarantee greater attendance and participation in the event. Their only requirement is to secure a pre-determined number of attendees, sponsorships, auction items, and/or raffle tickets. By recruiting a sizable committee that agrees to these basic requirements, you are able to guarantee a minimum number of participants and revenue generated for the event. While they do not need to attend regularly scheduled meetings or conference calls, make sure to check-in regularly and provide updates to the committee as the planning and recruitment timeline progresses.

**Committee Member Responsibilities**
Regardless if you are a Steering or At-Large Committee Member, **ALL** volunteers should be responsible for the following:
- Recruiting event attendees.
- Securing at least 1 sponsorship/auction item or XX amount of raffle tickets.
- Attending the event as participant or volunteer.

Additional responsibilities of the Committee Chair and Steering Committee are outlined on the next page and Example Steering Committee Roles can be found in the Appendix.
Committee Chair Position Description

Term: 12 months
Time Involvement: 3-5 hours/month

Position Commitments:
- 3-5 hours per month, with greater time commitment three months leading up to the event.
- Serve as the main point of contact between the committee and University staff.
- Develop goals/responsibilities for committees and event.
- Oversee recruitment and selection of committee volunteers with University staff assistance.
- Organize and hold Steering Committee conference calls/meetings (3-4 expected).
- Support the event’s fundraising efforts with a personal commitment, either by attendance or a monetary contribution.

Key Responsibilities:
- Be an enthusiastic promoter of scholarship and the event your committee chose to hold.
- Act as liaison between the committee and the Office of Alumni Relations, reporting activity and feedback.
- Work with the Office of Alumni Relations to guide committee members through scholarship event guidelines, ensuring all volunteers understand their goals and responsibilities.
- Assign outreach strategies to committee members to increase event participation.
- Maintain permanent record of all financial matters that pertain to event.
- Oversee attendee solicitation process and track progress and status.
- Plan event day program and manage coordination with the Office of Alumni Relations and committee.
- Recruit and coordinate on-site volunteer activity during the day of the event.
- Manage and ensure the timely completion of all auction and sponsorship deliverables.
- Work with committee and Office of Alumni Relations to review and manage communication timeline.

Steering Committee Member Position Description

Term: 12 months
Time Involvement: 1-3 hours/month

Position Commitments:
- 1-3 hours per month, with greater time commitment three months leading up to the event.
- Participate in Steering Committee conference calls/meetings (3-4 expected).
- Assist in completing event goals determined by Committee Chair and the Office of Alumni Relations.
- Support the event’s fundraising efforts with a personal commitment, either by attendance or a monetary contribution.

Key Responsibilities:
- Be an enthusiastic promoter of scholarship and the event your committee chose to hold.
- Contact Villanova alumni and friends to encourage support and assist in meeting event goals.
- Be aware of scholarship event guidelines ensuring all volunteers understand their goals and responsibilities.
- Maintain the permanent record of any financial matters that pertain to event.
- Plan event day program and manage coordination with Alumni Relation Office and committee.
- Complete all event day, auction and sponsorship deliverables as determined by your chair.
- Share any communication and marketing efforts with your network.
- Post-event follow up and thank you to all those who supported the event and scholarship fund.
# Event Planning Timeline & Checklist

## 8-10 Months Prior
- Submit event date and location to the Office of Alumni Relations for University approval.
- Once approved, event “Save the Date” added to Alumni Calendar.
- Appoint Event Committee Chair/Co-Chairs.
- Develop Steering Committee & At-Large Committee Member guidelines & expectations.
- Recruit Steering & At-Large Committee Members (VU alumni, parents, friends).
- Office of Alumni Relations secures special guests/keynote speaker from the University.
- University Insurance/Risk Management reviews, approves and signs venue contract before external promotion can begin.

## 6-8 Months Prior
- Host kickoff conference call between Committee Chair and University Advancement staff leads to review budget, communication timeline, logistics and goals.
- Host Steering Committee meeting/call as needed.
- Communicate with At-Large Committee members as needed.
- Determine sponsorship needs/levels for event.
- Draft initial budget worksheet.
- Determine sources of event revenue (registration fee/price points, auction, raffle, etc.).
- Determine on-site volunteer needs and recruit individuals/groups to manage.

## 4-6 Months Prior
- Host Steering Committee meeting/call as needed.
- Communicate with At-Large Committee members as needed.
- Special Events Team Lead creates online registration page.
- University Communication sends "Save the Date" email to target audience.
- University Communication drafts print and email event invitations with content input from Committee Chair.
- Secure auction items including item description, photo, Fair Market Value and certificates of authenticity (if applicable).
3 Months Prior

- Host conference call between Committee Chair and University staff leads to review budget, communication timeline, logistics and goals.
- Host Steering Committee meeting/call as needed.
- Communicate with At-Large Committee members as needed.
- University Communication mails print invitation to Chapter region; additional copies mailed to Committee Chair for local distribution.
- University Communication sends email invitation to target audience & past participants.
- Meet with venue to review logistics, space & timeline.
- Draft “show-flow” & script for event program with Alumni Relations staff assistance.
- Alumni Relations staff secures giveaway items for attendees.

2 Months Prior

- Host Steering Committee meeting/call as needed.
- Communicate with At-Large Committee members as needed.
- Review list of registered attendees & sponsors (provided by Alumni Relations Lead).
- Finalize “show-flow” & script for event program.
- Finalize on-site volunteers and review responsibilities.
- Determine signage needs for event (sponsorship, directional, etc.)

1 Month Prior

- Host Steering Committee meeting/call as needed.
- Communicate with At-Large Committee members as needed.
- Review list of registered attendees & sponsors (provided by Alumni Relations Lead).
- University Communication drafts program booklet with content input from Committee Chair.
- Conduct walk-thru of venue to determine logistics and placement.
- Conduct inventory of all gifts/prizes to ensure accuracy.
- Verify all signage and banner needs and placement.
- Confirm all details of on-site registration and develop and efficient process; create on-site registration form if applicable.
- Alumni Relations Lead creates online auction bidding site, which will open for bidding 2 weeks prior to the event.
- University Communication sends reminder email invitation to target audience, teasing online auction bidding site information.
2 Weeks Prior

- Host conference call between Committee Chair and University staff leads to review budget, timeline, logistics and goals.
- Host Steering Committee meeting/call as needed.
- Communicate with At-Large Committee members as needed.
- Review list of registered attendees & sponsors (provided by Alumni Relations Lead).
- Prepare a checklist and volunteer/staff assignments for day of event.
- Prepare Event Contact List including all day-of volunteer/staff phone numbers.
- Finalize all food and beverage arrangements, providing guarantees where applicable.
- Alumni Relations Lead launches online auction site and sends reminder email.
- Finalize list of auction items and prepare printed bidding sheets (include Fair Market Value).
- University Communication finalizes and prints event program booklet (cut-off for sponsorship & auction item inclusion).
- Alumni Relations Lead mails giveaways, decor and supplies to Committee Chair.

1 Week Prior

- Host Steering Committee meeting/call as needed.
- Communicate with At-Large Committee members as needed.
- Review final list of registered attendees & sponsors so any necessary last minute registrations may be captured before day of event.
- Confirm all banners, signs and décor are ready for day-of event or already secured on site.
- Pre-determine a set arrival time for all volunteers/staff to be at the venue on day of event.
- Make the necessary food and beverage arrangement for volunteers and continually thank them for their time and support!

Day of Event

- Volunteers/Staff arrive early for setup and training; assign individual instructions to all personnel.
- University Staff collects and retains on-site registration fees.
- Execute event and scripted program.
- University Staff collects payment from auction winners and distributes winning items, with volunteer assistance.
- If monetary raffle, winner must fill out and sign appropriate tax forms prior to receiving payment from University.
### 1-2 Weeks After

- Office of Alumni Relations pays any outstanding bills.
- Review attendance list provided by Alumni Relations Lead for accuracy.
- Determine final budget – income, expenses, revenue.
- If applicable, submit Reimbursement Request Forms/Gift In Kind Forms along with itemized receipts to Alumni Relations Lead for processing.
- Office of Alumni Relations transfers proceeds from the event to Scholarship Fund account and other designated charities (if applicable).
- University Communication emails participants thanking them for attending, informing how much money was raised and inviting them to future events (content input from Committee Chair).
- If monetary raffle, University Procurement Office processes tax forms and mails winning checks.

### 2-4 Weeks After

- University Gift Processing sends gift acknowledgement letters to attendees & auction winners, where applicable.
- Committee Chair sends thank you notes/emails to sponsors and auction donors.
- Host debrief conference call between Committee Chair and University staff leads to review final budget and event logistics - what went well, what are areas of improvement?

### Within 3 Months After

- Identify venue & date for next year’s event and submit for University approval.
- Office of Alumni Relations assists with student application process and distribution of scholarship funds.
Additional Areas of Concern

Fundraising for External Charities/Non-VUAA University Scholarship Funds
Fundraising for charities outside of the established Scholarship Fund is permitted, within reason. The Chapter/Group must work with the Office of Alumni Relations to determine the level of support given by the charities in the planning and execution of the event in return for dollars raised.

Inclusion of non-VUAA scholarship funding opportunities should be explored by members of Chapter/Group leadership and the Office of Alumni Relations before the event is approved.

All charities must be in line with the University’s mission, and be approved by both the committee and Office of Alumni Relations. No more that 10% of the profit raised from a given event should fund outside charities. All outside charities are responsible for covering their own event expenses, including advertising, personnel, and travel.

Requesting Additional VU Giveaways
Each year, VUAA will provide an established set of VU-branded giveaways for attendees. Additional giveaways may be requested by the Chapter/Group, limit two (2) items. The cost of these additional items must be paid for by the event proceeds as well as be factored into the tax credit allotted to attendees. The Chapter/Group must work with the Office of Alumni Relations and approved licensed vendors of the University in order to secure these items.

High-Profile University/Alumni/Parent Guests
Oftentimes Chapters/Groups request the University President or other high-profile University staff, faculty, alumni or parents to attend events as special guests. In regards to the University President (Father Peter), due to his demanding travel schedule, we are unable to guarantee his attendance at events; however we will work with you to find an alternative University representative to attend as a special guest.

Chapters/Groups must work with the Office of Alumni Relations to secure all University guests. Volunteers should NOT contact the Office of the President directly for Father Peter’s availability.

Event Invitation Lists
The University mails print invitations to a limited number of alumni, current parents and friends within the Chapter/Group. Your Alumni Relations staff liaison can work with you to determine the appropriate criteria that fit within the printed invitation allotment.

Email invitations may be broadcasted to a wider region in consultation with regional volunteer leadership and the Office of Alumni Relations. The Chapter/Group must work with their Alumni Relations staff liaison to determine the appropriate email definitions for their event.
# Appendix

## REIMBURSEMENT REQUEST FORM

Please return completed form with all itemized receipt(s) using one of the following methods. Allow at least 4-6 weeks for check processing.

<table>
<thead>
<tr>
<th>Date of Request:</th>
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<table>
<thead>
<tr>
<th>Name:</th>
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</thead>
</table>

<table>
<thead>
<tr>
<th>Class Year:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Mailing Address:</th>
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</thead>
</table>

<table>
<thead>
<tr>
<th>Email Address:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Phone Number:</th>
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<table>
<thead>
<tr>
<th>Chapter/Group:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Event Date:</th>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Event Name:</th>
</tr>
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</table>

### Receipt 1

<table>
<thead>
<tr>
<th>Amount:</th>
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<table>
<thead>
<tr>
<th>Purpose:</th>
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</table>

### Receipt 2

<table>
<thead>
<tr>
<th>Amount:</th>
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</table>

<table>
<thead>
<tr>
<th>Purpose:</th>
</tr>
</thead>
</table>

### Receipt 3

<table>
<thead>
<tr>
<th>Amount:</th>
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</thead>
</table>

<table>
<thead>
<tr>
<th>Purpose:</th>
</tr>
</thead>
</table>

### Total Amount for Reimbursement:

### Return Instructions

<table>
<thead>
<tr>
<th>Mail:</th>
<th>Office of Alumni Relations, Re: Reimbursement Request</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Villanova University, 800 E Lancaster Ave, Villanova, PA 19085</td>
</tr>
<tr>
<td>Email:</td>
<td>Email to Chapter/Group staff liaison (Judy, Lael, Matt or Max)</td>
</tr>
<tr>
<td>Fax:</td>
<td>610-519-7583, Attention: Reimbursement Request</td>
</tr>
</tbody>
</table>

### To be filled out by the Office of Alumni Relations

<table>
<thead>
<tr>
<th>Account Name:</th>
<th>Account No.:</th>
</tr>
</thead>
</table>
GIFT-IN-KIND ACCEPTANCE FORM

Villanova University accepts non-cash gifts that have a University-related use, directly support students, faculty or staff, or can easily be sold to provide revenue for the University. Gifts-in-Kind include, but are not limited to, items such as lab equipment, computer hardware and software, printed materials, and artwork. The value of the Gift-in-Kind must be reported at its fair market value on the date of the contribution. In order to accept a Gift-in-Kind this form must be completed by the donor or company and a Villanova University representative. Per IRS regulations, Villanova will provide an acknowledgement for Gifts-in-Kind with the date and description of the gift, but not the value.

To be completed by donor

Donor/Contact Name: ____________________________________ Company Name: _______________________

Address: ____________________________________________________________________________________

City: ___________________________________________ State: ________ Zip: _________________________

Email: ___________________________________________ Phone: _____________________________

Provide a description of item(s) being donated or attach an itemized list: ____________________________

____________________________________________________________________________________________

Estimated Fair Market Value: ______________________

Source of Estimate: ____ Donor  ____ Independent Appraisal (Please include copy of appraisal)

IRS Form 8283 is not required for gifts under $500 but is required for gifts over $500. For gifts over $5,000, IRS Form 8283 must be signed by a qualified appraiser and Villanova's VP Finance/Controller.

To be completed by Villanova University Faculty/Staff

Anticipated Campus Location (e.g. Building/Room): __________________________________________________

College, Department or Program Accepting Donation: ________________________________________________

University-Related use of Donation (Please include a signed corporate agreement, as applicable):

____________________________________________________________________________________________

____________________________________________________________________________________________

Faculty/Staff Contact: ___________________________________________ Extension: _________________

Donor ID: __________________ Soft Credit: __________________ Date: ________________

Please send this completed form and all appropriate supporting documentation to Janet Duffy, Gift & Pledge Processing. For questions about Gifts-in-Kind, please contact Steve Grourke at ext. 93587.
Sample Thank You Note to Donors/Sponsors

Office of Alumni Relations will provide a template letter design with University logo and event theme. It is then the responsibility of the Committee to send the acknowledgement letters/emails to auction item donors and sponsors.

Date

Addressee
Address Line 1
City, State Zip

Dear [Name]:

On behalf of the [Chapter/Group Name], the Villanova University Alumni Association, and the University community, thank you for your most generous support of the [Event Name] held on [Date].

Thanks to your participation and support, the [Chapter/Group Name] raised over [$ Amount] to support the [Scholarship Fund]. Each year, our [Chapter/Group] awards merit based scholarships that provide financial assistance to students from the local area who currently attend Villanova. We are grateful for the time and support you give toward our mission to ignite change by engaging alumni, parents, students and friends.

We truly hope you enjoyed your experience at this annual event and look forward to you joining us again next year. Thank you for all you do for Villanova!

Regards,

[Name]
[Title], [Chapter/Group Name]
Example Steering Committee Roles

*NOTE: These are just suggested roles, not mandatory. All correspondence between the Steering Committee and Office of Alumni Relations should be filtered through the Committee Chair.*

<table>
<thead>
<tr>
<th>Event Planning &amp; Management</th>
<th></th>
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</thead>
<tbody>
<tr>
<td><strong>Role</strong></td>
<td><strong>Description/Responsibilities</strong></td>
</tr>
</tbody>
</table>
| Planning Director         | Oversee, manage and ensure the timely completion of all event planning & management tasks and deliverables. Primary responsibilities include:  
  • Attend planning committee meetings to report group’s status and progress.  
  • Lead and manage group’s sub-committee meetings, resources and activities.  
  • Develop schedule and timelines. |
| Venue Coordinator         | Plan activities and manage coordination of event with the host venue. Primary responsibilities include:  
  • Attend group’s sub-committee meetings reporting to the Planning Director and when required attend committee meetings.  
  • Manage communications and overall relationship with the host venue.  
  • Work with University Events Team Lead to:  
    • Coordinate logistics, program, catering, etc.  
    • Coordinate sponsor requirements and deliverables for day of the event. |
| Event Day Coordinator     | Plan activities as well as oversee and direct all on-site activities the day of the event. Primary responsibilities include:  
  • Attend group’s sub-committee meetings reporting to the Planning Director and when required attend committee meetings.  
  • Work with University Events Team Lead to:  
    o Coordinate logistics, program, catering, etc.  
    o Coordinate sponsor requirements and deliverables for day of the event.  
    o Manage event setup (registration table, signage etc.).  
    o Plan event program with Alumni Relations staff.  
    o Plan and manage execution of Silent Auction. |
| Registration Coordinator  | Manage and track attendee registration and registered attendee communications. Primary responsibilities include:  
  • Attend group’s sub-committee meetings reporting to the Planning Director and when required attend committee meetings.  
  • Manage registration process prior to the event.  
  • Work with the Office of Alumni Relations to set up the registration webpage.  
  • Manage communication with registered attendees both pre-event and post-event.  
  • Handle registration day of the event. |
### Networking Coordinator

Manage and organize networking component to be conducted during the event. Primary responsibilities include:

- Attend group’s sub-committee meetings reporting to the Planning Director and when required attend committee meetings.
- Determine networking opportunities, supplies and volunteers required.
- Manage networking activity day of the event (set-up, take down signage, volunteer direction, etc.).

### Volunteer Coordinator

Manage recruitment and coordination of volunteers for the day of the event. Primary responsibilities include:

- Attend group’s sub-committee meetings reporting to the Planning Director and when required attend committee meetings.
- Work with the entire committee in the recruitment of volunteers.
- Compile and track list of required volunteers.
- Organize and assign volunteer tasks.
- Coordinate and direct volunteers on the day of the event.

### Planning Support Member

Primarily support Planning Director and Event Planning & Management team with various tasks, including but not limited to:

- Prepare event day signage and materials.
- Organize and assemble silent auction items.
- When required, attend group’s sub-committee meetings.

### Event Day Volunteer

Provide on-site support during the day of the event. Volunteer roles include:

- Work registration table.
- Silent Auction assistant.

### Sponsorship

<table>
<thead>
<tr>
<th>Role</th>
<th>Description/Responsibilities</th>
</tr>
</thead>
</table>
| **Sponsor Director** | Oversee, manage and ensure the timely completion of all sponsorship tasks and deliverables. Primary responsibilities include: 
  - Attend planning committee meetings to report group’s status and progress. 
  - Develop and coordinate overall solicitation process and tracking. |
| **Participant Coordinator** | Manage participant solicitation process and track progress and status. Primary responsibilities include: 
  - Attend group’s sub-committee meetings reporting to the Planning Director and when required attend committee meetings. 
  - Develop and manage list of targets for potential participants. 
  - Solicitation of attendees. |
<table>
<thead>
<tr>
<th>Role</th>
<th>Description/Responsibilities</th>
</tr>
</thead>
</table>
| Sponsorship Coordinator | Manage sponsorship solicitation process and track progress and status. Primary responsibilities include:  
  - Attend group’s sub-committee meetings reporting to the Planning Director and when required attend committee meetings.  
  - Develop and manage list of potential sponsors.  
  - Solicitation of sponsors.  
  - Manage communications and overall relationship with sponsors.  
  - Work with Event Planning & Management to ensure sponsorship requirements are delivered. |
| Auction Coordinator     | Manage auction solicitation process and track progress and status. Primary responsibilities include:  
  - Attend group’s sub-committee meetings reporting to the Planning Director and when required attend committee meetings.  
  - Develop and manage list of potential targets for silent auction donations.  
  - Solicitation of silent auction donations.  
  - Manage communications and overall relationship with auction donors.  
  - Work with the Office of Alumni Relations to manage receipt and storage of silent auction donations.  
  - Support Event Planning & Management in organizing event day silent auction. |
| Sponsor Support Member  | Primarily support Sponsor Director and Sponsor team with various tasks, including but not limited to:  
  - Solicitation of potential participants, sponsors and silent auction donors.  
  - When required, attend group’s sub-committee meetings. |
| Marketing               |                                                                                                                                                                |
| Role                    | Description/Responsibilities                                                                                                                                 |
| Marketing Director      | Oversee, manage and ensure the timely completion of all marketing tasks and deliverables. Primary responsibilities include:  
  - Attend planning committee meetings to report group’s status and progress.  
  - Lead and manage group’s sub-committee meetings, resources and activities.  
  - Develop marketing and social media plan. |
<table>
<thead>
<tr>
<th>Position</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advertising Coordinator</td>
<td>Manage and coordinate advertising initiatives.</td>
</tr>
<tr>
<td></td>
<td>Primary responsibilities include:</td>
</tr>
<tr>
<td></td>
<td>• Attend group’s sub-committee meetings reporting to the Marketing Director and</td>
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<td></td>
<td>when required attend committee meetings.</td>
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<tr>
<td></td>
<td>• Work with Marketing Director to:</td>
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<tr>
<td></td>
<td>• Identify advertising opportunities in materials, signage, and throughout event.</td>
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<tr>
<td></td>
<td>• Attach amounts to advertising opportunities.</td>
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<tr>
<td></td>
<td>• Communicate with sponsors purchasing ad space (Provide ad specs – size,</td>
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<td></td>
<td>placement, color/black &amp; white, etc.)</td>
</tr>
<tr>
<td></td>
<td>• Provide and enforce artwork deadlines.</td>
</tr>
<tr>
<td></td>
<td>• Collect artwork; ensure delivery to printer by deadline.</td>
</tr>
<tr>
<td>Digital Media Coordinator</td>
<td>Manage and coordinate digital and social media content.</td>
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<tr>
<td></td>
<td>Primary responsibilities include:</td>
</tr>
<tr>
<td></td>
<td>• Attend group’s sub-committee meetings reporting to the Marketing Director and</td>
</tr>
<tr>
<td></td>
<td>when required attend committee meetings.</td>
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<tr>
<td></td>
<td>• Work with Marketing Director to:</td>
</tr>
<tr>
<td></td>
<td>• Develop digital media strategy: timeline, messaging, channels, etc.</td>
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<td></td>
<td>• Create interesting web, Facebook and Twitter content.</td>
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<td></td>
<td>• Research and identify other digital marketing opportunities.</td>
</tr>
<tr>
<td>Marketing Support Member</td>
<td>Primarily support Marketing Director and Marketing team with various tasks,</td>
</tr>
<tr>
<td></td>
<td>including but not limited to:</td>
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<tr>
<td></td>
<td>• Post and distribute event posters and flyers.</td>
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<td></td>
<td>• Delivery of materials and event set up.</td>
</tr>
<tr>
<td></td>
<td>• When required, attend group’s sub-committee meetings.</td>
</tr>
</tbody>
</table>