



WAKE FOREST  
UNIVERSITY

WAKE FOREST  
AFFINITY GROUP  
RESOURCE GUIDE



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## **WHAT ARE AFFINITY GROUPS?**

Wake Forest University Affinity Groups are communities of alumni, parents, students, and friends of Wake Forest connecting on the basis of shared interests or experiences. Affinity Groups are created by alumni around a profession, special interest, culture, or student group and provide alumni, parents, students, and friends with opportunities for networking, professional or personal development, lifelong learning, resource sharing, and an expanded sense of community. Similar to our regional alumni communities, Wake Forest Affinity Groups exist through the support of a volunteer leadership team that provides opportunities for virtual interactions and in-person events that bring the Affinity Group members together in support of the group's mission.



## HOW TO START A NEW AFFINITY GROUP

Any alumni interested in starting a new affinity group should first contact the Office of Alumni Engagement at 336.758.5264 or [alumni@wfu.edu](mailto:alumni@wfu.edu). A representative will work with the interested alumni to complete the necessary steps and fill out the New Affinity Group Worksheet.

Prior to distributing communication to the alumni base or planning any events, the new Affinity Group must determine and identify the following:

- A finalized Affinity Group name
- The type of Affinity Group (professional, special interest, student group, or cultural)
- The mission and goals of the Affinity Group
- The audience to whom the Affinity Group will market their communications and events
- Three or four alumni volunteer leaders committed to launching the group and serving as co-presidents and/or executive committee members for a minimum of three years, during which time they will work in coordination with the Alumni Engagement contact to identify their successors.

In the initial stages of launching the Affinity Group, the Alumni Engagement contact will also assist the alumni volunteers to determine and identify the following:

- Any other key University contacts within the Office of Personal and Career Development, Campus Life, Academic Departments, or other departments on campus as appropriate
- All websites or social media platforms the Affinity Group plans to utilize
- An executive committee and committee chairs
- Next steps (events and alumni communications)



## UNIVERSITY OFFICE CONTACT INFORMATION & RESPONSIBILITIES

The primary University contact for all affinity groups will be a representative in the Office of Alumni Engagement. You may reach Alumni Engagement at [alumni@wfu.edu](mailto:alumni@wfu.edu) or 336-758-5264.

A summary of how the Office of Alumni Engagement can serve you is listed below.

- What We Can Provide:
  - o Strategy & Feedback on event ideas, implementation, and goals
  - o Demographic information for the market (e.g. Age, Vocations, Locations, Gender, etc.)
  - o 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 Office of Alumni Engagement.
  - o Connections with Regional Community leaders
  - o Payment Processing: The Affinity Groups program aims to break even on all affinity group events. Event attendees register on the Wake Forest Alumni website and pay an attendance fee when they register. Invoices for catering, venue services, etc. are to be sent directly to the Office of Alumni Engagement for payment.
  - o 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 Affinity Group.
- What We Cannot Provide:
  - o Excessive e-mail communication: University Policy dictates email communication from all offices on campus. Affinity Group emails are limited to two per month, unless circumstances should necessitate additional outreach.
  - o Funding: All Affinity Group events are expected to break even.
  - o Event implementation: It is our desire to support you and the other volunteers in planning and executing Affinity Group events, as the Office of Alumni Engagement cannot take full responsibility for the coordination of these events in regards to vendors, venues, and event implementation. We hope to foster collaboration among your executive committee and offer helpful resources as you seek to maintain and grow the engagement and involvement of your Affinity Group.

## OTHER UNIVERSITY CONTACTS

Other University contacts may include staff in the Office of Career and Personal Development, faculty members from the appropriate department(s), staff members in charge of any related student organization(s), and any another staff or faculty member deemed appropriate for each group. Affinity



Group leaders should work with your Alumni Engagement representative to identify the appropriate staff and/or faculty contacts.

The Office of Career and Personal Development (OPCD) is an important resource for all professional Affinity Groups and the primary contact will be determined on a case by case basis. For most professional Affinity Groups, working with the OPCD serves as an opportunity to assist and connect with current students pursuing the group's dedicated profession(s). At the request of the OPCD most student-oriented events and services should be initiated after the Affinity Group has taken time to solidify an active alumni network. Due to the OPCD's schedule, planning and coordination for any events requested or organized by an Affinity Group for the benefit of current students, should generally begin prior to the academic year.

For current examples of alumni and the OPCD collaborating to assist students on their career path please see the links below to Career Exploration Treks and Career Connects.

<http://career.opcd.wfu.edu/explore-careers/career-exploration-treks/>

<http://career.opcd.wfu.edu/5732-2/>



## **AFFINITY GROUP LEADERSHIP & SUCCESSION PLANNING**

The success of each Affinity Group is the direct result of the advance planning and creative thought of the Affinity Group's officers and executive committee members. Group leadership serves as the central organizing body for each group and implements the programmatic offerings. Some groups have an officer structure, while others have an executive committee to lead local efforts. Many groups 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 events.

Affinity Groups should have at least one president, or two co-presidents, and a minimum of three executive committee members or officers at all times. The founding president(s) should commit to serving in that capacity for at least two consecutive terms for two year, to help successfully launch a sustainable Affinity Group.

During the time that the presidents and executive committee members serve, they should assist the Alumni Engagement contact in identifying future leaders from the active volunteers and group members and transitioning them into the leadership roles as the current leaders step down.

Since Affinity Groups are not always region specific like the regional communities, Affinity Groups may choose to implement this structure virtually, in one central location/city, and/or with a smaller version of the leadership in several of the most active cities.



## **BILLS & EXPENSES**

All Affinity Group events are expected to break-even, as the Office of Alumni Engagement does not provide a budget or financial support for Affinity Groups. There are opportunities for Affinity Groups to receive assistance in offsetting some event costs:

- The Innovation Fund is designed to encourage creative programming generated by local communities. On an annual basis, each community and Affinity Group 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](http://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.

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

All event registration will take place on the Wake Forest Alumni 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 Office of Alumni Engagement.





## 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 communities' website. Additional marketing tools are:

- Word of mouth
  - Encourage Affinity Group officers, executive committee members and event participants to talk up events amongst their own network of friends
  - Divide lists of local alumni among group 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 group events
  - During any Affinity Group or Regional Community event, ensure that you mention upcoming activities to make sure people reserve the spot on their calendars in advance!
- Social networking sites
  - Facebook
  - Instagram
  - LinkedIn
  - Twitter

## SOCIAL MEDIA

While Affinity Group events, updates, and registration are all to be primarily accessed through the Wake Forest Alumni 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 group events and in facilitating an otherwise active alumni region within your market.

Your Office of Alumni Engagement contact is required to have administrative right to all groups and/or the necessary username and password to access these accounts.



## **FACEBOOK**

When your Affinity Group is hosting an event, you can create an event on Facebook (either through the Affinity 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.

## **LINKEDIN**

LinkedIn can provide a valuable resource particularly to Affinity Groups, as these groups are based on profession, special interest, culture, or student groups, rather than regions.

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 Wake Forest Alumni 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 Office of Alumni Engagement 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:** rentals, catering, tax, gratuity, etc. The Wake Forest Communities Program aims to break even on each Affinity Group event. Therefore, accurate attendance and cost estimates are very important. To keep costs low, consider looking for event space without rental fees (conference rooms within a members' office, separate areas at restaurants, etc.)
- II. **Inform the Office of Alumni Engagement 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 Alumni Engagement a heads up a minimum of 1 week in advance for any email invitations that you will desire to be sent out. 3-4 weeks in advance is preferable
- III. **Office of Alumni Engagement responsibilities**
  - a. **Sign contracts:** contracts for WF events must be approved by Alumni Engagement
  - b. **Invitations:** communication will be sent by Alumni Engagement staff; if your group leverages Facebook/LinkedIn, then create event announcements on those platforms as well for distribution
  - c. **RSVPs:** event registration will take place on the Wake Forest Alumni site unless alternate arrangements are made
  - d. **Name tags & giveaways:** materials will be mailed to groups in early Fall to distribute accordingly; if additional supplies are needed, please contact the Office of Alumni Engagement



#### IV. **Local Affinity Group responsibilities**

- a. **Liaison:** the event host/volunteer will be in continuous contact with the Office of Alumni Engagement
- b. **Communication:** group volunteers will encourage attendance by leveraging personal network
- c. **Payment:** notify the Office of Alumni Engagement 24 hours in advance of event for direct payment to vendor
- d. **Invoices:** can be emailed, faxed or mailed to the Office of Alumni Engagement immediately following event for payment
- e. **Reimbursement requests:** can be emailed, faxed or mailed to the Office of Alumni Engagement immediately following event for prompt payment; Alumni Engagement 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 W-9 form as part of the reimbursement process

#### V. **Day of event**

- a. **At least 1 Affinity Group leader volunteer** should be at event location 45 minutes prior to event
- b. **Registration:** local group should provide at least one person to assist with registration; for more formal business events there should be one person per every 20 registrants to assist with registration
- c. **Actual attendee list:** updated attendance list and monies collected on-site should be sent to the Office of Alumni Engagement
- d. **Photos:** take a few photos of a wide variety of attendees to publicize the success of the event. Photos can be posted on group website, Flickr gallery, and social media sites.
- e. **Announcements**
  - i. **Volunteer Opportunities:** utilize this time to highlight areas of need within the Affinity Group. The Alumni Office can update you on any specific needs for alumni engagement.
  - ii. **Update Information:** Encourage alumni to update their information on the WakeNetwork and to encourage their alumni friends to do the same
  - iii. **Facebook, LinkedIn, Twitter:** Wake Forest Alumni has LinkedIn, Facebook, and Twitter pages! Highlight this briefly so alumni can take advantage of social and networking opportunities with fellow Wake Forest alumni. If your Affinity Group has a Facebook or LinkedIn group, or Twitter account, 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 the Office of Alumni Engagement**
- b. **Survey:** The Office of Alumni Engagement will send a brief survey to all attendees within the first 2 business days following the event. These results will be shared with Affinity Group leaders within one month of the event.
- c. **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?
- d. **Photos:** send any photos to the Alumni Office to load into the Affinity Group's Flickr gallery or upload onto Facebook!



## EVENT SUMMARY

### Professional and Social – Networking Social

The purpose of the Affinity Group Networking Social is to provide an opportunity for Wake Foresters working in a given industry to come together, share experiences, and make valuable professional networking connections.

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

Because the purpose of the event is to allow alumni, parents, and student to mingle and socialize, it is best to find a popular, centrally-located, bar/restaurant with a private or semi-private space where attendees can purchase their own food and beverages.

*Tip: Ensure that you have a registration table available for name tags, trinkets, cups, etc. and encourage alumni to bring business cards. Name tags and business cards are key to this event, so that alumni can follow-up on any conversations.*

#### II. **Inform the Office of Alumni Engagement** (4 weeks in advance at minimum)

Notify the Office of Alumni Engagement of the time and location selected by the Affinity Group, 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. Alumni invitation emails should be sent approximately four weeks before the event and a reminder closer to the event.

*Tip: For free social events like these, you should expect approximately a 25% no-show rate, as well as a number of walk-ins. It is important to capture the names of both no-shows and walk-ins and send this to the Office of Alumni Engagement post-event.*

#### III. **Office of Alumni Engagement responsibilities**

The Alumni Office will send email invitations to the alumni, parents, and friends in the area and collect responses from alumni who register for the event on the Alumni website. At your request, 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 Affinity Group responsibilities**

The local Affinity Group 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.



*Tip: Affinity Group leaders should make a special effort to encourage alumni and parents who hold more senior positions in the industry to attend. This will help ensure that there are resources for the many young alumni new to the industry to network with.*

## **V. Day of event**

At least one Affinity Group leader should arrive onsite at the bar/restaurant at least 45 minutes in advance to make sure everything is set up properly. Remaining Affinity Group leaders and community volunteers should arrive 15 minutes early to assist with nametags, collecting business cards, and welcoming guests.

While the networking social should not be program-heavy, this is an excellent opportunity to briefly introduce current Affinity Group leaders, begin recruitment of new volunteers, and encourage attendees to join or follow any social media pages.

Remember to take photos at the event to post on the Affinity Group's website, Flickr galleries, and social media pages.

## **VI. Follow-Up**

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

Within 2 business days, the Office of Alumni Engagement will send a brief survey to attendees.

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



## EVENT SUMMARY

### Professional & Intellectual Development – Specialized Panel Event

Many professionally focused Affinity Groups host an annual or bi-annual professional networking and panel events. The panels usually consist of 3-5 experts in the field and 1 experienced moderator. It is important that the moderator is knowledgeable of the topic and skilled at facilitating engaging conversations.

#### I. **Set the event** (8 weeks in advance) – date, location, panelists, and cost

The most challenging aspect of this program is securing the appropriate panel members. Affinity Group leaders should determine a topic that is timely and will appeal to a wide audience of Affinity Group members. For example, the Wake on Wall Street Affinity Group hosts a panel and networking event each January on the topic of the financial market outlook for that year. Since the market outlook is constantly changing, this topic is always applicable.

Other Affinity Groups may have to draw specific topics from the current trends and headlines within their field. For example, Global Deacs, the international policy and affairs Affinity Group, held a panel on the changing dynamics of U.S.-Cuba Relations in the months following the U.S. government's announcement of normalizing relations with Cuba.

Once Affinity Group leaders determine a topic, they should begin brainstorming potential panelists. This is a great opportunity to utilize the contacts that you have made through your Affinity Group. Reach out to your University contacts in the Office of Alumni Engagement and the OPCD, as well as faculty members. Requests for panelist suggestions may also be posted on the groups' social media sites.

Some Affinity Groups find that selecting one high-profile, well-connected panelist, and setting the date and time around that person's schedule (keeping in mind to select a date and time that will maximize alumni participation) can help to recruit other panelists. Obtain permission from that panelist to use their name while requesting the participation of other professionals, and ask if he/she has any other suggestions for good panelists and/or moderators.

In a community where most alumni and parents work, selecting a time after work makes the program accessible for more people. Many of our panel events take place on Tuesdays, Wednesday, or Thursdays, with registration and networking starting between 6 and 6:30, and the panel roughly an hour later. Don't forget to leave some time after the panel for further networking and opportunities for attendees to meet the panelists.

The venue should offer both a place to hold a networking reception prior to the panel and a location for the panel presentation that includes audio/visual projection capabilities. Consider the size of the local alumni and parent base and anticipated attendance in selecting a location. The location should have suitable acoustics for the panel and for a





lively reception. Many businesses have excellent, and often free, options for this type of professional event. Once a venue is selected, the Affinity Group leaders can elect what refreshments will be available for the reception. Typically the Affinity Group will arrange for catering for a light reception (beer / wine / appetizers) prior to the event.

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

*Tip: 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 communities should consider making use of the business and charitable contacts of their members to secure a suitable space. Venues often have approved caterers that they can put the organizers in touch with as well. When calculating cost, do not forget to include the cost of any rentals, labor, tax, and gratuity.*

## **II. Inform the Office of Alumni Engagement (6 weeks in advance at minimum)**

Notify the Office of Alumni Engagement of the time and location selected by the Affinity Group, 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. If the full panel has not been confirmed at this time, a note can be included that other panelists may be added. 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 to five weeks before the event and a reminder closer to the event.

If the panel includes a Wake Forest faculty member, the local Affinity Group leaders 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 Affinity Group may also have the opportunity to host the faculty member for a dinner or lunch before or after the presentation.

*Tip: The local Affinity Group point person for the event should be able to recommend nearby hotels, restaurants, and other local amenities for any 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 Affinity Group representative(s) should actively solicit registrations from Affinity Group members to ensure that the event is well attended.*

*Spouses, colleagues, parents, and current students are welcome to attend a panel event. It is also a great way to showcase the University to guidance counselors at local schools or to prospective students and parents, so consider forwarding the invitation to any of your community contacts as well.*



### **III. Office of Alumni Engagement 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 communities' website. After the event, the Alumni Office will send a brief survey to all attendees and share the results with the Affinity Group leaders.

### **IV. Local Affinity Group responsibilities**

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

*Tip: After confirming the topic and panelists, the three critical tasks for the local Affinity Group 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 panel members is worthwhile.*

### **V. Day of event**

At least one Affinity Group leader should be at the venue at least 45 minutes prior to the event to assist with setup, ensure all microphones and other technology work properly, and meet the panelists. Other local leaders should assist with welcoming attendees, registration, nametags, and ensuring a lively reception.

An Affinity Group leader should introduce the panel members. Also, be sure to recognize any other community leaders who have been instrumental in organizing the event, and announce upcoming Affinity Group events. Remember to take photos at the event to post on the Affinity Group website and social media. Also, use this opportunity to encourage people to join or follow any social media platforms.

### **VI. Follow-Up**

Since most participants have previously registered and paid for the event, the local Affinity Group 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 communities. The Affinity Group should make appropriate gestures to thank the panelists, as well as any community 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 Affinity Group.