

Sept 2023; changed "Vice President" to "Chair" // Update Nov 2023 by Chris Panero
AAUW Fund Chair + Event Planning Kit

Job Description:

- Inform members about the many facets of the AAUW Fund program.
- Work with the board, President, and Program VP to plan the Annual Meeting, including a speaker from among those supported by grants from AAUW.
- Coordinate branch fund raising (donations, etc.) for the Fund program.
- NOTE: In recent years, the events around the AAUW Fund have changed from a fairly elaborate luncheon or dinner to a **Zoom** meeting. If you want to have a lunch or dinner, see the information at the end of this document.

Responsibilities:

- Familiarize yourself with the AAUW Fund program.
 These websites may be helpful:
 - <https://www.aauw-ca.org/category/aauw-fund/>
 - <https://ca-online.aauw.net/about-usjoin-us/aauw-fund/>
- Publicize the AAUW Fund to branch members in the Triad, and consult with the President about brief announcements at Board and general meetings.
- Donations
 - File donation checks and records according to National or State guidelines and deadlines.
 - Acknowledge donors to the AAUW Fund program.
 - Recognize major donors as appropriate. Special recognition may also be made in the Triad or provided by AAUW-CA.
- AAUW Fund Named Gift Honoree(s) and Fund meeting
 - Ask the Board and other members to anonymously nominate members as Named Gift Honorees. With the President, choose one or Honorees. The number of Honorees varies by how much the branch has donated to AAUW Fund in the past year, but traditionally has been kept to two to preserve its importance.
 - The identity of the honoree(s) is kept confidential until presented at the annual AAUW Fund meeting. The meeting may be virtual, in-person, or a lunch or dinner.
 - Arrange for the speaker and inform the membership about the AAUW Fund. The AAUW Fund meeting is a joint effort of the President, AAUW Fund Chair, Hospitality if needed, Program VP (to arrange a room if needed), and Zoom Manager if needed.
 - If it is the Annual Meeting, there will be an election of officers as well.
- Attend the state AAUW Fund meeting in October or November; it's a good place to find possible speakers for the Fund Dinner. Since Covid, these meetings have been **via Zoom**. // **In 2022 and 2023, this process has become a Peer Group monthly Zoom meeting hosted by AAUW-CA. In 2023, the Fund speakers recorded brief overviews of their work and branches could choose speaker after viewing the presentations.**
- Coordinate any other AAUW Fund events with the Program VP.

Member of:

Board (Executive Committee)

Program Planning Committee, as needed to coordinate dates

Coordinate with: President, Hospitality if needed, Program VP (to arrange a room if needed), and Zoom Manager if needed

Deadlines:

- Triad deadline (15th of month), for information about AAUW Fund program
- ???Dec. 1: Branch Financial report due to the CA AAUW Fund Director or National.
- ???May: Check that the \$2 per paid member is transferred from General Fund to AAUW Fund.
- Maintain a notebook that includes your End of Year report and any other useful materials.

March 2023

AAUW FUND EVENT CHAIR for an in-person event

Overview

In the past (before Covid), the AAUW Fund meeting was often a lunch or dinner with a theme and decorations. If you want to revive that practice, it's probably best to assemble a committee to help you. Members might include Hospitality, a person to create graphics or decorations if you want to have a theme or print a paper program, Hospitality, Program VP (to arrange a room), and others. If you want to have a fundraiser, consider something like a book sale. NOTE: Talk to the Treasurer before you consider a drawing or raffle, as there are important tax consequences.

Job Description: Plan, coordinate and produce the AAUW Fund Event (the Annual Meeting)*. [Note: see helpful Checklist following (prepared by Jeanne Wangsness).

Responsibilities:

1. Find a suitable dinner location and reserve as soon as possible.
2. Coordinate with Program Vice President to set date of the AAUW Fund Dinner.
3. Organize a committee** to determine theme, decorations, date, and time and menu for the dinner. Take sign-ups at general meetings and from *Triad* articles.
4. Arrange for a member to receive dinner reservations. Set a reservations deadline.

NOTE: If dinner is at a restaurant or other eating facility, items 5 through 7 are not necessary.

- 5. Organize punch preparation and serving for the pre-dinner gathering time. New members are usually asked to serve punch on a 20-minute rotating schedule during the pre-dinner gathering time.
- 6. Organize set-up, clean-up, and serving groups, unless dinner is at a restaurant.
- 7. Designate one person at each table to be hostess (often a past president or past named-gift recipient) to help with clearing tables and to bring coffee and tea and dessert to table.
8. Arrange for name tags, hostess place cards, and perhaps table numbers, as needed.
9. Coordinate with the AAUW Fund Chair about articles to the *Triad* Editor.
Submit reservation information in issues of the *Triad* preceding the dinner.
10. Attend Board meetings, as needed, prior to the dinner.
11. Prepare a report about the dinner and submit to the President.

***Note:** Evening's schedule will include a **program planned by the AAUW Fund Chair** (Fund information, guest speaker, and named gift honoree presentation, etc.), and also a **business agenda set by the President** (elections, bylaw changes, etc.)

Deadlines:

- Aug. 1: Give proposed date to Program Vice President.
- *Triad* deadline: 15th of the month preceding the event (and perhaps earlier issues) and after the event to thank helpers.
- Maintain a Chairman's book. Include End of year reports and any other useful materials.
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****Chair of:** Fund Event/Annual Meeting Dinner Committee; may include AAUW Fund Chair, Hospitality chair and others, such as reservations chair, as needed.

Helpful Checklist prepared by Jeanne Wangsness for in-person event

From: "Wangsness, Jeanne" <JWangsness@cbtnorcal.com>

Date: June 13, 2018 6:31:45 PM PDT

To: "nancy1oliver@earthlink.net" <nancy1oliver@earthlink.net>

Subject: FW: Added Actions for EO Event

Nancy,

What I did not put on the checklist below was: Seek out the Venue. This search took up a lot of time. Initially I planned to have the Event at Mimi's where I was able to define the Menu and related costs. For the \$40/person I was able to negotiate: a pre-dinner champagne reception; 3 Entrée selections; incl. wine selections, dessert, coffee/tea. When this fell through when Mimi's was not able to stay open, I needed to find another Venue.

Places checked: The Elk's Lodge, SM (I considered personally paying the room fee if we could get the cost ~\$42-\$45/person); The Kingfish, San Mateo; McArthur Pk, PA; Porterhouse, San Mateo; Left Bank, MP; Angelica's, RWC; The Van's, Blmt; Central Park Bistro, SM; Lion's Club, RWC; Civic Garden Club, SC; Irongate, SC; RWC Community Activities Bldg, RWC. Either cost, accessibility, or availability on weekday evening caused so many of these venues to be non-choices.

Jeanne

From: Wangsness, Jeanne **Sent:** Wednesday, June 13, 2018 6:10 PM **To:**

'nancy1oliver@earthlink.net' <nancy1oliver@earthlink.net> **Subject:** Actions for EO Event

Event Actions:

Fundraiser:

1. Contact Lauren Vierra (lvierra2@hotmail.com; 3727 Florence, RWC): **done**
2. pick up baskets: **done**
3. Raffle tickets: get ticket boxes: **done**
4. Segment tickets into 1s, 10s, 20s, 25s: **done**
5. Baskets description cards: design/print: **done**
6. Bring baskets for segmented tickets: have 1, need 1 more---**done**
2. TRIAD entry before 3/10/2018: **done**
3. eBlast reminder 1-2 wks prior to dinner: **done**
4. Collect \$/menu selections: ongoing; **done; to collect 2 who are paying at dinner**
5. Make table centerpieces:
 - baskets/plants/moss: done (10 baskets w/plats & moss); bought 3 new plants--**done**
 - Buy balloons: **done**
6. Named Gift Honorees (NGH):
 - Get Introducers for NGH: for Sandra:Ellen; for Karen: Wilma, Et al.: **done**
 - Flowers for NGHs: **done---bought mums**
 - Obtain/frame certificates for NGHs : **done**
7. Programs & inserts: design/print: **done**
8. Design/print menu selection place cards: **done**
9. Remind Carole Farina to bring nametags: **done**
10. Audio equip:
 - pick up projector from Karen: **done**
 - pick up microphone from June H—June bring to Board Mtg: done
 - set up at Divino's:

- i. (they prefer 6 tables of 8) but Divino prefers--5 tables; 4 w/10 and
1 w/11: **OK; done**
- ii. Registration table: **arranged**
- iii. Baskets table & easel: **arranged**
- bring extension cord for projector/mic: **done**
- 11. Checks:
 - Deliver checks to Margot Diltz at Board Mrg: **done**
 - get checks to pay: Guest's meal: \$50 + \$25 mileage= **\$75 done**
 - get check to pay Restaurant: **asked Margot for \$42 x 51=\$2142; Restaurant check should have been \$40 x 51+ \$2040; turns out we had 53 attendees so Restaurant fee would then be \$40 x 53 = \$2120; overpayment to Restaurant of \$22—Ok/JW**
- 3. Confirmations (# and Entrees)
 - Preliminary confirm 3/28 w/Carlos w/48: **done**
 - Last Confirm 3/30 w/Divino (# and Entrée selections): **51: done**
- 4. Get podium—Ruthie to bring: **done**
- 5. Recruit staff:
 - Staff Registration table: Carolyn: **done**
 - Raffle sales: Marilyn Zack & Sara: **done**
- 6. Clean up: **done**
- 7. Thank you letters to basket donors (5): **done**
- 8. Submit invoices for expenses paid by me: **done**
- 9. Submit Speaker Evaluation form to Sharon Westafer: **done**
- 10. -Tabulate amounts Member donations/print Donor Appreciation Certificates for presentation Installation Lunch: **done**
 - Write article for TRIAD by 6/10—**not done; will do for next TRIAD**