



MARQUETTE NROTC ALUMNI & FRIENDS ASSOCIATION, INC.

Marquette University NROTC Unit
1532 W. Clybourn Street
Milwaukee, WI 53233-2202

AGENDA

BOARD OF DIRECTORS MEETING

Tuesday, 17 August, 2021 at 1800 CDT

Virtual access via Zoom (web or app): <https://bit.ly/3xoNLkn>

Meeting ID: **322 983 9446**, Passcode: **277118**

“One tap mobile” phone sequence: **+13126266799,,3229839446#,,, *277118# US (Chicago)**, or
+13017158592,,3229839446#,,, *277118# US (Washington DC)

Manual dial by phone – select a “Dial by Location” phone number:

+1 (312) 626-6799 (Chicago), +1 (301) 715-8592 (Washington DC), +1 (669) 900-9128 (San Jose)

...and enter Meeting ID: **322 983 9446** and Passcode: **277118**

For overseas or additional US local numbers: <https://bit.ly/3x10bth>

SLA

I. (Agenda provided separately)

A&FA

I. Call to order and establishment of quorum (Marty Menez and Ed Taicsich)

II. Vote to approve agenda (Marty Menez)

III. Vote to approve 18 May, 2021 Board meeting minutes (Marty Menez)

IV. Officers’ Reports

A. Secretary (Ed Taicsich), including

1. Major outstanding items/reminders from Calendar of Annual Board Actions/Events

B. Treasurer (Scott Christensen), including

1. A&FA financials

2. 2021 A&FA budget actuals and proposed 2022 budget

C. President (Marty Menez), including

1. Appreciation to CAPT Vandersluis

2. Welcome to prospective CO, CAPT Lonnie Appleget

3. Incoming CO Brief 10 August, 2021

4. Need for 2022-2023 A&FA officer candidates

V. Old Business

A. Report on YTD realization of 2021 pillars to guide A&FA activities (Albert Lagore)

1. Alumni Recognition (Austin Helm)

2. Philanthropy (Albert Lagore)

3. History & Tradition Preservation (Unit history – Albert Lagore, Portholes/history – Mike Good/Phil Claiborne)

4. Social Networking/Camaraderie (TBD)

5. A&FA - NROTC Unit Engagement (Marty Menez and Mike Good)

- B. Need successor coordinator candidate(s) for Pillars tracking (Marty Menez)

VI. A&FA Area Reports

- A. Class Representatives (LT Zachary Dueñas, Japan)
 - 1. Score card on filling gaps in Class Reps and alternates/deputies
- B. Membership (Mike Good):
 - 1. Membership update
 - 2. Alumni contacts synchronization & Wild Apricot subscription
 - 3. Analysis with temporary Wild Apricot data base expansion
- C. Awards (Austin Helm)
 - 1. 2021 Alumnus/a and Young Alumnus/a of the Year awards status
- D. Communications (Phil Claiborne, Chris Nemeth, and Mike Good contributing):
 - 1. Social Media (Website, Facebook, LinkedIn, Instagram, Twitter) (Phil Claiborne)
 - 2. 2021 Newsletter status
 - 3. Meeting audio visual acoustic and connection improvements
- E. Unit/Midshipmen Support (CAPT Matt Vandersluis, LT Cantleberry, and Albert Lagore):
 - 1. NROTC Unit COVID-19 accommodation update and planning (CAPT Vandersluis)
 - a. General University 2021 calendar update
 - b. Plans for 2021/2 academic year
 - c. Knowns and known unknowns
 - 2. Midshipmen battalion update (LT Cantleberry)
 - a. Events and alumni participation
 - b. Midshipmen spaces refresh update
 - c. Alumni funds 2021-2022 expenditures and projections
 - 3. SLA/Battalion support item review (Albert Lagore)
- F. Hospitality & Reunions (Ed Taicsich):
 - 1. 2022 Alumni Reunion planning
- G. Networking (TBD)
 - 1. Need a coordinator willing/able to go the distance
 - 2. Engage class of Navy, Marines & Nurses near End of Active Service (EAS)
 - 3. Update on plan for maintaining contact/participation of Class of 2021

VII. New Business (Marty Menez)

- A. Formulation of 2022 Pillars
- B. December social event?
- C. Nominations for next A&FA President and Treasurer
- D. 501c(19) tax deductibility issue

IX. Offered Items (All)

X. Date of next regular A&FA Board Meeting – 9/16/23 November, 2021? (All)

XI. Adjourn



MARQUETTE NROTC SEAPOWER LEADERSHIP ASSOCIATION, INC.

Marquette University NROTC Unit

1532 W. Clybourn Street
Milwaukee, WI 53233-2202

AGENDA

17 Aug 21 BOARD OF DIRECTORS MEETING

- I. Opening of Meeting/Quorum Call**
- II. Officers' Reports**
 - A. Secretary**
 - B. Treasurer**
 - C. Chairman**
- III. Old Business**
- IV. New Business**
 - A. Unit Expenditure Proposal**
 - B. Offered Items**
- V. Schedule next Board meeting: ICW A&FA**



**MARQUETTE NROTC ALUMNI & FRIENDS ASSOCIATION, INC.
BOARD OF DIRECTORS MEETING MINUTES FOR
18 May 2021**

Opening of Meeting:

The meeting was called to order by President Marty Menez at 1801 CDT, 18 May 2021. Pursuant to the University's decision to cancel University events due to the COVID-19 pandemic, quarterly meeting was held exclusively via teleconference.

A quorum being present, further proceedings were held in accordance with the planned agenda and bylaws.

Present at the meeting: (via teleconference)

Directors: Albert Lagore, Martin Menez, CAPT Matt Vandersluis, Mike Good, Phil Claiborne, Scott Christensen, Ed Taicsich, and Austin Helm.

Other Participants: CDR Brandon Youngstrom, LT Henry Cantleberry, LT Zach Dueñas, William Conley (Class of 1965), Joseph Ilk (Class of 1978), Paul Fletcher (Class of 1981), and Craig Peterson (Class of 1984)

Approval of the Agenda, Minutes: The agenda was unanimously approved; the minutes from the regular 23 February 2021 meeting were unanimously approved.

Officers' Reports

Secretary's Report:

- Ed Taicsich presented a revised version of the upcoming board actions/events from the Calendar of Annual Board for Actions/Events, and highlighted upcoming events for May, June, and July.
 - As the Marquette University Reunion Weekend has moved from the Fall semester to June, the Calendar of Annual Board for Actions/Events will be updated to reflect this change.

Treasurer's Report:

Scott Christensen presented the following A&FA financial status:

- 15 Feb 21 balance: \$16,437.17.
- 11 May 21 balance: \$15,410.77.
- Change since last report: \$-1,026.40.
 - **Credits: \$140.00.**
 - Dues: \$140.00 (3 checks, 0 PayPal).
 - Donations: \$310.00 (0 check, 0 Pay Pal).
 - **Debits: \$-1,166.40.**
 - \$-1,166.40 Annual renewal of Wild Apricot software.

Scott Christiansen presented the Profit and Loss Statement, for the period 1 Jan 21 to 11 May 21:

- Total income \$1,103.56.
- Total expenditures -\$1,354.33.

- Net income \$-250.77.
- Balance Sheet \$15,410.77.

Treasurer's Report for A&FA was unanimously approved.

SLA financial status was included in the consolidated meeting package but was not covered during this meeting.

Scott Christiansen presented 2021 Budget update:

- Budgeted income for 2021 is \$3,272; income thus far is \$1,090.
- Expenses are for the Wild Apricot renewal, and alum of year plaque expenses: \$1,340.77.
- A question arose regarding budgeting support of the golf tournament: discussion ensued: a line item will be maintained, for general purposes, such as "promotional:retention/membership"; a golf tournament donation would be covered by this category; name of this category will be determined at a later date.

Presidents Report:

Marty Menez reported:

- Golf Outing:
 - Information about sponsoring a hole was received with short notice.
 - An offline debate among directors ensued about money being managed by the Midshipmen as opposed to University, the Unit, or the Staff.
 - Due to the above two factors, input was not received in time to commit to sponsor a hole.
 - Albert Lagore suggested adding potential sponsorship opportunities to the actions calendar February.
- Annual meeting: four directors' terms are expiring: Mike Good, Phil Claiborne, Albert Lagore, and Marty Menez; these directors are requested to consider shipping over.
- Officers: Treasurer (Scott Christiansen) and President (Marty Menez) have a 2-term limit, ending 31 Dec 2021.

Old Business

Realization of 2021 Pillars to guide A&FA activities:

Albert Lagore presented an update on the 2021 Alumni Pillars:

- **Alumni Recognition**-Austin Helm reported:
 - Continue to recognize alumnus/a and young alumnus/a.
 - Open for nominations for this year.
 - LCDR Quigley recognized a woman Marquette NROTC grad on the A&FA Facebook page during Woman History Month.
- **Philanthropy:**
 - Donations were received.
 - Donated about \$7,000 to the unit from SLA.
 - Albert Lagore Expressed thanks to the Unit staff for giving us ideas for funding social networking.
- **History & Tradition Preservation:**
 - Additional effort is needed: Albert Lagore will reach out to the years 2010-2015.
 - Mike Good mentioned there are some gaps in Porthole yearbooks; he will reach out to the MU Archive department and reconnect; and make a request during the annual meeting to see if we can get year donations for missing years.
- **Social Networking/Camaraderie:**

- LCDR Quigley was very active in social media with her posts during Woman's History month, which brought a lot of recognition, part of camaraderie.

A&FA Area Reports:

Class Representatives:

Zach Dueñas provided the following written update:

- Current Projects:
 - Outreach to all contact emails in Wild Apricot Database.
 - Many e-mails "non-deliverable" due to inactive e-mail addresses.
 - Will contact Marquette University Alumni department to reconcile e-mail addresses from their database.
 - Will also provide a list of "bad" e-mail addresses to clean up wild Apricot database.
 - Required to use personal account instead of Wild Apricot email function as a lot of accounts are disabled or have selected "Unsubscribe".
 - Class Reps filled in recently: 1995, 2006 (expecting more in the next few weeks).
 - Please contact me via text or call for any RFIs or assistance with representatives, (415)-412-9041.
- Future Discussion:
 - Reach out to current class representatives to update contact profiles in database (email and contact number top priorities).
 - Expecting to be back stateside for follow-on department head tour in Spring 2022 where time zone will no longer cause issues.

Membership:

Mike Good presented the following:

- Mike Good presented what the A&FA and the SLA are to the graduating seniors, to encourage the newly commissioned officers to join.
- 2021 goal is every member recruit one new member.
- Current membership is at 176 (paid members, recent grads/CO); slight downturn is due to recent graduates' 2-year free membership expiring.
- Membership has been consistently 200+ since January 2017.
- Updates on the Alumni contacts synchronization & Wild Apricot subscription and Analysis with temporary Wild Apricot data base expansion will be provided at a future board meeting.

Awards:

Austin Helm presented the following:

2020 Alumni and Young Alumni of the Year Awards.

- The nomination period for the 2021 Alumnus/a of the Year, and Young Alumnus/a of the Year is 15 April through 15 August 2021.
- Nominations come from the members and are to be submitted via e-mail.
- Guidelines and nomination forms are available on the website.
- Communications for awards are via social media (Facebook), in the annual newsletter, and e-mail: reminders sent approximately every two to three weeks.
- Estimated voting period will be 16 August to 31 August, followed by notification of recipients.

Communications:

Phill Claiborne reported:

- Social media subscribers:
 - LinkedIn: 168 members.
 - Twitter: 17 followers.
 - Facebook: 340 members.
 - Instagram: 99 followers.
- Email campaigns:
 - Audience 746 contacts; 743 are subscribers.
 - Overall email campaigns 41.2% opened, 4.9% clicked.
 - Recipient location:
 - USA 94.2%.
 - Canada 4.2%.
 - Germany/Spain/Japan 1.5%.
- Phil reiterated that the Holiday Zoom Happy Hour was a great success. 26 Alumni participated; breakout rooms were grouped by graduation decade.

Unit/Midshipmen Support:

CAPT Vandersluis presented the following Unit update:

- Upcoming events:
 - Commissioning was held at 1400 on 23 May, at Eckstein Towers Commons.
 - Summer training will take place early May through August at various locations.
 - Midshipmen and most of the staff are participating.
 - New Student Orientation (NSO) welcome aboard: 28 August.
 - Fall semester begins: 30 August.
 - Freshman Orientation Race for Competitive Exploration (FORCE), NSO culminating event and picnic: 2 October.
 - Location TBD.
 - Madison/Badger Drill Meet: 23 October.
 - Fall Ball: 12 November.
 - Location TBD.
- New staff Arrivals:
 - Incoming Professor of Naval Science, CAPT Lonnie Appleget, will arrive mid-July.
 - Nuclear Power/Submarine Advisor, LT Eric Fugleberg, arrived in April.
- Alumni funds expenditures:
 - Midshipman New Student Orientation kits.
 - Gym equipment:
 - Weights and bar racks, core-trainers, deluxe squat rack (on order, has not yet arrived).
 - Midshipman study room coffee station and refrigerator.
 - Mid-term and finals weeks fuels ups.
 - Graduate hometown lawn signs.
 - Midshipman coffee mugs.
 - Approximately \$200 alumni funds remain to spend.
- Plans for next academic year:
 - NSO/FORCE/picnic.
 - Leadership conferences.
 - Fall and Spring Balls.
 - Cross-town student parking passes.

- Student social events (midterms, finals, Thanksgiving, Christmas, etc).
- Drill meets/shooting events.
- Field exercises (Marine option).
- Community briefings and get togethers (Fleet and Alumni).
- Alumni reunions/meet ups.

LT Cantleberry provided a detailed list of all events, projects, and periodic expenses and quantities for AY 21/22 for the Alumni Association's consideration.

Hospitality & Reunions:

Ed Taicsich presented an updated of the 2021 Reunion Weekend/Open House:

- Open House will be held virtually, immediately following the Annual Meeting.
- Ed Taicsich, Phil Claiborne and LCDR Ida Quigley will coordinate the presentation of the Annual Meeting/Open House.

Schedule: The next A&FA Board meeting will be held virtually, at 1800 CDT on 17 Aug 2021.

Adjournment: Meeting was adjourned at 1949 CDT.

Ed Taicsich
Secretary

Marquette NROTC Alumni & Friends Association, Inc.

Calendar of Annual Board Actions/Events

January

1. Acknowledge receipt of A&FA Membership Dues (the Unit CO or SLA will separately acknowledge and thank people for all donations made to the SLA).

February

1. File a Form 990-N, Electronic Notice (e-Postcard) for Tax Exempt Organizations (due in to the IRS by May 15th).
2. Obtain the awards (Sword and Nurse Kit) that will be presented by a Marquette NROTC Alumni & Friends Association (A&FA) representative on Joint ROTC Pass in Review/Awards Day in April.
3. Send out and/or post notices to Members to inform them of and invite them to the Joint ROTC Pass in Review/Awards Day activities on the scheduled day in April. (schedule on Zoom if feasible.).
4. Initiate discussions for sponsorship opportunities (i.e. sponsoring a hole in the Spring Golf Outing).
5. Plan for the June Unit Alumni Reunion/Open House zoom meeting.
6. Call for agenda items for 1st Quarter Board meeting and distribute the meeting notice and agenda; arrange for Zoom meeting if feasible/necessary.

March

1. Participate in 1st Quarter Board Meeting:
 - a. Review the annual dues for each Membership Class and set the dues for the following year.
 - b. Record meeting on Zoom; initiate zoom meeting 15 minutes prior to start time; announce that meeting is being recorded.
 - c. Coordinate with Unit to schedule an A&FA and SLA Presentation to Midshipmen.
 - d. Schedule the 2nd Quarter Board Meeting.
2. Send out and post notices to Members to invite them to attend the May Commissioning Ceremonies (the informal individual commissioning for NROTC outside the St. Joan of Arc Chapel [no seating is available here] or at the Unit in foul weather at 0800 and the formal group commissioning for Navy, Army & Air Force ROTC at the Varsity Theatre at 1000); arrange for Zoom meeting if feasible.
3. Evaluate the May Armed Forces Week events and send out and/or post notices to Members to inform them of any events that would be appropriate for their attendance/participation.
4. Find out how many spring semester graduates will be looking for temporary employment while assigned to the Individual Ready Reserve (IRR) following commissioning and start the networking process with the Members to try to help find such jobs.

April

1. Attend Joint ROTC Pass in Review/Awards Day and present the A&FA's awards to the recipient Midshipmen; arrange for Zoom meeting if feasible/necessary.
2. Prepare Alum Assn. Annual State of the Association message that is to be included in the May issue of the Unit's Alumni Newsletter (report on the state of the A&FA, thank people for past support, recruit new members, recruit volunteers where needed, solicit

donations for the Seapower Leadership Association (SLA), remind members to pay dues, etc.).

3. Call for agenda items 2nd quarter Board meeting and distribute the meeting notice and agenda; arrange for Zoom meeting if feasible/necessary.

May

1. Offer the Recent Graduates Membership (free for the first two years after graduation) to the graduating class and enter membership data to database.
2. Attend Commissioning Ceremonies (informal individual commissioning for NROTC outside the St. Joan of Arc Chapel [no seating is available here] or at the Unit in foul weather at 0800 and formal group commissioning for Navy, Army & Air Force ROTC at the Varsity Theatre at 1000).
5. Participate in 2nd Quarter Board Meeting:
 - a. **Record meeting on Zoom; initiate zoom meeting 15 minutes prior to start time; announce that meeting is being recorded.**
3. Schedule the 3rd Quarter Board Meeting.
4. Participate in the appropriate Armed Forces week events.
5. Send out and post notices to Members to solicit nominees for the Alum of the Year Award and Young Alum of the Year Award from them (the selection criteria should be sent along and posted with the request for nominees. Nominations are due in by August 15th).
6. E-mail the A&FA Annual State of the Association message to Members who provided E-mail addresses and request payment of next year's Membership Dues and solicit donations to the SLA (the paper copy of the annual message will be sent to Members who don't provide E-mail addresses as an insert in the May issue of the Unit's Alumni Newsletter).
7. Finalize the plans and agenda for the June Annual Meeting/Alumni Reunion/Open House.
8. Send out and post notices to Members and to all alums to inform them of and invite them to participate in the June Annual Meeting/Alumni Reunion/Open House, either in person, or via Zoom or teleconference call.

June

1. Conduct the Annual Meeting:
 - a. Invite alums who are not Members to join the Alum Assn.
 - b. Announce to membership expiration dates for officers/directors whose terms are expiring.
 - c. **Establish Zoom meeting 15 minute prior to start of Annual meeting; if recorded, inform all participants.**
 - d. Invite all who are participating to consider applying for a BoD position.
 - e. Help staff the registration table to sign in and welcome all attendees, to verify/update all alums contact information and to invite alums who are not Members to join the Alum Assn. Retain the sign-in sheets in a file.
2. Send out and post reminder notices to Members to get their nominees for the Alum of the Year Award and Young Alum of the Year Award submitted by August 15th.
3. Verify that SLA funds are forwarded to the unit prior to the end of Marquette's fiscal year (30 June).

July

1. Use Unit Alumni Reunion/Open House sign-in sheets to update database
2. Initiate POA&M for next year's Reunion/Open House.
3. Call for agenda items for 3rd Quarter Board meeting and distribute the meeting notice and agenda; arrange for Zoom meeting if feasible/necessary.
4. Send out and post reminder notices to Members to get their nominees for the Alum of the Year Award and Young Alum of the Year Award submitted by August 15th.

August

1. Find out when and where the Midshipmen will be holding their Fall Navy & Marine Corps Birthday Ball (usually held on Friday of either the last weekend in October or the first weekend in November) and send out and post notices to Members advising them that they will be invited by the Midshipmen to attend that Ball and suggesting they consider attending.
2. Participate in the 3rd Quarter Board Meeting.
 - a. Review directors/officers list for expiration dates.
 - b. Schedule 4th Quarter Board Meeting. Prepare a succession plan for the Directors and Officers whose terms of office will expire on December 31st of the current year.
 - c.
 - d. Record meeting on Zoom; initiate zoom meeting 15 minutes prior to start time; announce that meeting is being recorded.
 - e. Coordinate with Unit to schedule an Alumni Presentation to Midshipmen.
3. Complete plans and preparations for the Alum of the Year Award and Young Alum of the Year Award:
 - a. Review nominees and select the recipient by September 1st.
 - b. Notify the recipient and invite recipients and recipients' spouses or recipients' representatives to the Fall Navy & Marine Corps Birthday Ball.
 - c. Order the recipient award plaques and get the plates for the two perpetual plaques engraved with the information for each recipient.
 - d. Prepare a write-up on the biographies of the recipients and on the accomplishments that led to the recipients being selected for these awards (this might be published in the Fall Navy & Marine Corps Birthday Ball Program and will be read at the Ball either when the award is presented to the recipients or to the recipients' representative or when the award is announced in the cases when the recipients or their representatives are not able to be present to receive the award at the Ball).

September

1. Ensure that the Midshipmen's invitation to the Members to attend the Fall Navy & Marine Corps Birthday Ball either is E-mailed directly by the Midshipmen or is E-mailed, on behalf of the Midshipmen, by the President of the A&FA and that it is posted by the A&FA. Ensure Members are notified of: where to send their Fall Ball reservations and payments; that they should provide the names of all attendees in their party; and which hotel(s) have special room rates for this event.

October

1. Ensure that the Alum of the Year Award and Young Alum of the Year Award plaques are available for presentation at the Fall Navy & Marine Corps Birthday Ball.
2. Attend the Fall Navy & Marine Corps Birthday Ball:
 - a. Either present the Alum of the Year Award and Young Alum of the Year Award to the recipients/representatives or announce the award if the recipients / representatives are not able to be present.
 - b. Suggest that the Ball attendees, especially the Midshipmen, congratulate and thank the recipients for his or her accomplishments sometime during the remainder of the Ball.
3. Find out how many fall semester graduates will be looking for temporary employment while assigned to the Individual Ready Reserve (IRR) following commissioning and start the networking process with the Members to try to help find such jobs.

November

1. Plan for Zoom Holiday Happy Hour.
2. Call for agenda items for 4th Quarter Board meeting and distribute the meeting notice and agenda; arrange for Zoom meeting if feasible/necessary.

December

1. Participate in 4th Quarter Board Meeting:
 - a. Elect the Directors and Officers to replace those whose terms of office will expire on December 31st of the current year.
 - b. **Record meeting on Zoom; initiate zoom meeting 15 minutes prior to start time; announce that meeting is being recorded.**
2. Schedule the (next year's) 1st Quarter Board Meeting.
3. File a Wisconsin Nonstock Corporation Annual Report. (due in to the Department of Financial Institutions by December 31st).
4. E-mail a reminder to the Members asking them to consider making an end of the year tax deductible donation to the SLA.
5. Nominate/re-nominate directors/officers for those with expiring terms.
 - a. Send by-laws and key decisions to new BoD members.
6. **Send link for Zoom Holiday Happy Hour/post on social media.**
 - a. **Initiate Zoom meeting 15 minutes prior to start time.**
 - b. **Announce (if necessary) to attendees zoom meeting is being recorded.**
7. Offer the Recent Graduates Membership (free for the first two years after graduation) to the graduating class and enter membership data to database.
8. Attend Commissioning Ceremony, coordinate with Unit for TEAMS stream of event.

Seapower Leadership Association Funds Report – 8 Aug 21

- Balance of SLA Checking Account
 - 11 May 21 \$31,290.33
 - 8 Aug 21 \$27,694.21

Net Change \$-3,596.12

Seapower Leadership Association Funds Report – 8 Aug 21

- **Income \$500.00**
 - Donations \$500.00
 - 1 Donor (1 Check, 0 Pay Pal)
- **Expenditures \$4,096.12**
 - \$96.12 Navy Nurse Commissioning Kit for top graduating Navy Nurse Corp Midshipman
 - \$4,000.00 Donation to MU NROTC for leadership conferences, student socials, new midshipman kits, graduate packages

Marquette NROTC Seapower Leadership Association, Inc.

Profit & Loss

08/08/21

January 1 through August 8, 2021

Accrual Basis

	<u>Jan 1 - Aug 8, 21</u>
Ordinary Income/Expense	
Income	
Donations Received	2,427.25
Total Income	2,427.25
Expense	
Donations to MU NROTC Unit	7,000.00
Outstanding Senior Mid. Sword	535.00
Navy Nurse Commission Kit Award	96.12
Total Expense	7,631.12
Net Ordinary Income	-5,203.87
Net Income	<u><u>-5,203.87</u></u>

Marquette NROTC Seapower Leadership Association, Inc.

08/08/21

Balance Sheet

Accrual Basis

As of August 8, 2021

	<u>Aug 8, 21</u>
ASSETS	
Current Assets	
Checking/Savings	
Checking	27,694.21
Total Checking/Savings	<u>27,694.21</u>
Total Current Assets	<u>27,694.21</u>
TOTAL ASSETS	<u>27,694.21</u>
LIABILITIES & EQUITY	
Equity	
Opening Balance Equity	13,614.62
Unrestricted Net Assets	19,283.46
Net Income	<u>-5,203.87</u>
Total Equity	<u>27,694.21</u>
TOTAL LIABILITIES & EQUITY	<u>27,694.21</u>

Alumni & Friends Association Funds Report – 8 AUG 21

- Balance of A & FA Checking Account
 - 11 May 21: \$15,410.77
 - 8 Aug 21: \$15,430.77
 - Change since last Report: \$20.00

Alumni & Friends Association Funds Report – 8 Aug 21

- **Income \$20.00**
 - Dues: \$20.00 (1 Check, 0 Pay Pal)
 - Donations: \$0.00 (0 Checks, 0 PayPal)
- **Expenditures \$0.00**

Marquette NROTC Alumni & Friends Association

Profit & Loss

08/08/21

January 1 through August 8, 2021

Accrual Basis

	<u>Jan 1 - Aug 8, 21</u>
Income	
Program Income	
Donations	250.00
Membership Dues	873.56
Total Program Income	<u>1,123.56</u>
Total Income	1,123.56
Expense	
Contractual Expense	
Member Mgmt Software Expense	1,166.40
Total Contractual Expense	1,166.40
Program Expense	
Alumni Awards	167.93
Total Program Expense	167.93
Transfer to SLA	20.00
Total Expense	<u>1,354.33</u>
Net Income	<u><u>-230.77</u></u>

Marquette NROTC Alumni & Friends Association

08/08/21

Balance Sheet

Accrual Basis

As of August 8, 2021

	<u>Aug 8, 21</u>
ASSETS	
Current Assets	
Checking/Savings	
Checking Account	15,430.77
Total Checking/Savings	<u>15,430.77</u>
Total Current Assets	<u>15,430.77</u>
TOTAL ASSETS	<u>15,430.77</u>
LIABILITIES & EQUITY	
Equity	
Opening Balance Equity	9,825.68
Unrestricted Net Assets	5,835.86
Net Income	<u>-230.77</u>
Total Equity	<u>15,430.77</u>
TOTAL LIABILITIES & EQUITY	<u>15,430.77</u>

**Marquette NROTC Alumni Friends Association
2021 Line Item Budget
Budgeted vs. Actuals Comparison**

Marquette NROTC Alumni & Friends Assn - 501(c)19 Nonprofit Organization FY 2021 Budget				
		2021 Actual		
	2021 Plan	Thru 8-8-2021	2022 Proposed	
Balance Brought Fwd	\$ 15,661.54	\$ 15,661.54		
Line Revenue - Program or Project	Amount	Amount	Amount	Description / Notes
R1 Grants	0.00	0.00	0.00	
R2 Member Donations	0.00	250.00	0.00	Donations to A&FA in 2021 possible but not budgeted
R3 Corporate Donations	0.00	0.00	0.00	
R4 Membership Dues (plus add back of PayPal Fees for actual column only)	3,272.40	880.00	3,272.40	For FY 2020, 191 dues-paying members; 286 total members with 94 "Free" New Graduates + 1 Ex-officio (Unit CO); Currently 15 dues-paying members overdue; Nominally 120 dues paying members per year @ \$20 = \$2400.
R5 Fundraisers, events, sales	0.00	0.00	0.00	
R6 Interest income	0.00	0.00	0.00	
R7 Transfer to SLA	0.00	-20.00	0.00	
R9 Total	3,272.40	1,110.00	3,272.40	
Line Expenses - Program or Project	Amount	Amount	Amount	Description / Notes
E1 Admin Staff wages/compensation	0.00	0.00	0.00	
E2 A&FA Membership Mailing to Alumni	126.00	0.00	126.00	Postage for 75 mailings with SASF included (150 stamps @ \$0.55 = \$82.50) \$50 over 2019 actual added for Challenge Coin mailing
E3 USPS Priority Mail Fees for Porthole Yearbook scanning	0.00	0.00	0.00	
E4 Membership Promotion	0.00	0.00	0.00	
E5 Office supplies and materials	50.00	0.00	50.00	Nametags and envelopes
E6 Printing and copying	0.00	0.00	0.00	
E7 Telecommunications support	150.00	0.00	150.00	Teleconference / WebEx service (provided Pro Bono by Vito Centofanti); wireless speakerphone/ Zoom Teleconferencing Fee
E8 Travel and meetings	600.00	0.00	600.00	Officer authorized travel
E9 Marketing and advertising	0.00	0.00	0.00	
E10 Staff and volunteer training	0.00	0.00	0.00	
E11 Alumni Search Contract services	0.00	0.00	0.00	
E12 Miscellaneous	0.00	0.00	0.00	
E13 Non Profit Fees	10.00	0.00	10.00	WI Non-profit Annual Report Fee
E14 Domain Licensing Fee	0.00	0.00	0.00	1st domain license renewed for 3 years in 2019, 2nd domain license renewed for 3 years in 2020
E15 Membership Mgmt System	1,166.40	1,166.40	1,166.40	Rate: \$97.20/mo x 12 = \$1,166.40 (includes 20% fee for remaining with PayPal); \$250 increase for temp. boost of memb. Ceiling
E16 AOY Plaques	170.00	167.93	170.00	2 plaques for awardees + 2 label plates for perpetual plaques @ NROTC Unit (2019 actual \$158.70)
E17 Fall Ball Tickets for Awardees	300.00	0.00	300.00	2020: 2 awardees and 1 guest each.
E18 Annual Reunion Weekend Picnic/Zoom Holiday Party	600.00	0.00	600.00	Open House beer - So far this has been provided Pro Bono; could solicit contributions from Reunion Classes in future if bigger effort
E19 NROTC Unit Event Support	0.00	0.00	0.00	New Midshipment orientation training Alumni meal
E20 Ship / Base Tour & Social Event Support	0.00	0.00	0.00	
E21 PayPal fees for online member renewals	100.00	6.44	100.00	
E22 Subtotal	3,272.40	1,340.77	3,272.40	
E23 Total Expenses	3,272.40	1,340.77	3,272.40	
S1 Revenue over Expenses	0.00	-230.77	0.00	
S2 Preliminary Balance Carried Forward to Next Year	15,661.54	15,430.77	0.00	Goal is to carry forward approximately 2 years worth of A&FA annual operating expenses
S3 Optional: Annual Donation to SLA	\$0	\$0	\$0	"See formula logic described to the right"; it was agreed that this calculation is "advisory". The board can choose any SLA donation amount, or no donation, based on their view of needs for the future.
S4 Final Balance Carried Forward to Next Year if SLA Donation made	\$15,662	\$15,431	\$0	

Directors & Officers of A&FA



CAPT(Ret) Scott Christensen – Treasurer

* Mr. Phil Claiborne

* CAPT(Ret) Mike Good (immediate past President & Board Chair)

Mr. Austin Helm

* LtCol(Ret) Albert Lagore (also SLA Board Chair)

* CAPT(Ret) Marty Menez – President & Board Chair

LCDR(Ret) Ed Taicsich – Recording Secretary

CAPT Matt Vandersluis (ex. officio as Unit CO)

* Term as Director expires EOY CY 21

2021 Alumni Pillars



1. Alumni Recognition
2. Philanthropy
3. History & Tradition Preservation
4. Social Networking/Camaraderie
5. A&FA - NROTC Unit Engagement

Class Representative Coordinator Zachary E. Dueñas ('11)

- Current Projects
 - Outreach to all contact emails in Wild Apricot Database
 - Required to use personal account instead of Wild Apricot email function as a lot of accounts are disabled or have selected "Unsubscribe"
 - Class Reps filled in recently: 1995, 2006 (expecting more in the next few weeks)
 - Please contact me via text or call for any RFIs or assistance with class representatives, (415)-412-9041
- Future Discussion
 - Reach out to current class representatives to update contact profiles in database (email and contact number top priorities)
 - Expecting to be back stateside for follow-on Department Head tour in Spring 2022 where time zone will no longer cause issues

Class Representative Coordinator Zachary E. Dueñas ('11)

MU NROTC Class of 1994,

First off, I'd like to say that I hope you and your loved ones are doing well and staying safe wherever you may be. My name is Zach Duenas ('11) and I am the Class Representative Coordinator for the Marquette NROTC Alumni & Friends Association. I am writing to you all because there is currently a vacancy for your Class' Representative position. If any of you may be interested in assuming this role, I would love to speak with you to get things in motion. I, like many of you, have fond memories of my time at Marquette and I attribute many successes in life to the time I spent in that old building at 1532 West Clybourn Street.

I have attached a document which outlines some of the roles and responsibilities of the Class Representative. It may look daunting at first glance, but I can assure you that we're only trying to keep the communication lines open. I look forward to speaking with hopefully all of you. Thank you for your time.

Very Respectfully,


LT Zachary E. Duenas, USN
Class of 2011
MUNROTC A&FA Class Rep Coordinator
Email: z.e.duenas@gmail.com
Cell: (415)-412-9041



A&FA Membership Management

<https://marquette-nrotc-alumni.org>

Home
About Us
Join us
Events
Donate
Unit News
Contact



Marquette NROTC Alumni & Friends Association (A&FA)


Welcome to our new A&FA Membership Management Site hosted by Wild Apricot!

This "web-based platform" allows our members to log in from anywhere, renew A&FA dues, donate to SLA and update their contact info. It also allows our volunteers to log in from anywhere to administer association records.

What is "Wild Apricot"?

Wild Apricot is a top rated web-based software for small associations, clubs, and nonprofits to help them manage their membership, set up a website, conduct events, and perform other activities. It is "cloud" software, meaning it runs through a web browser without needing to install anything on your local computer.

75th Anniversary Sign Donated by A&FA



The MU NROTC Unit 75th Anniversary Challenge netted donations of \$1505.00 toward the new sign expense total of \$2275.00. With a strong 2015 financial year, A&FA was able to fund the remaining balance of \$770.00 for the sign to be fabricated and delivered in December 2015.


Thank you to all of our alumni and friends who supported this much needed "facelift" for our unit!

Become a member

Join over 200 alumni and friends who have already made a commitment to work together to support our NROTC Unit and maintain the bonds of comradery that we formed years ago. Dues are still only \$20.00!

Join us

Get Involved



WE WANT YOU!

Join the team and be a part of leading and running your association. This past year a few top notch individuals have answered the call, and we need more solid performers like them. Don't worry - it's a very part time commitment - and you will find it's a rewarding way to "give back". Many hands make for light work! Please don't hesitate to contact us to discuss a supporting role for your A&FA. Email us at: munrotcalumni@gmail.com

- Board of Directors
- Career Networking
- Class Representative
- Class Reunion Coordination
- Committee Chairperson
- Committee Member
- Communications / Public Affairs
 - Annual Newsletter
 - Social Media (Facebook & LinkedIn pages)
 - Website
- Hospitality (Annual Open House / Tours / Special Events)
- Membership
- Future Officer Positions:
 - Secretary
 - Treasurer
 - President.

Upcoming events

ANNUAL A&FA MEMBERSHIP MEETING
07 Oct 2017 9:00 AM • MU NROTC Unit - Seapower Library


ANNUAL ALUMNI REUNION WEEKEND OPEN HOUSE
07 Oct 2017 10:00 AM • MU NROTC Unit

Annual Newsletter

Download the A&FA Annual Newsletter:
Marquette NROTC Alumni and Friends Assn_Summer 2016
[Newsletter_28July2016.pdf](#)

Check out our Website

<http://www.marquette-nrotc-alumni.org>

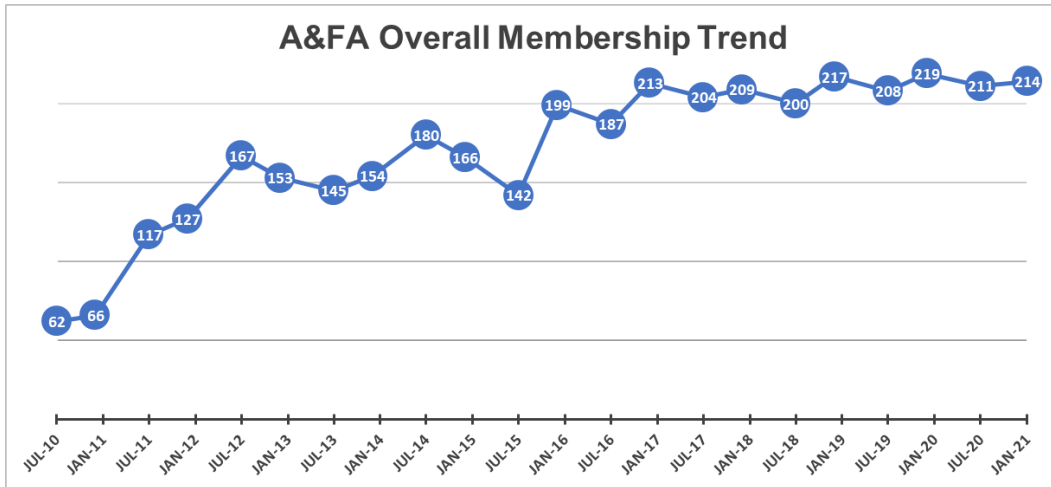


Marquette NROTC Alumni & Friends Association (A&FA) is a 501(c)19 Veterans non-profit organization.
Mailing Address: 1532 W Clybourn Street, Milwaukee, WI 53233

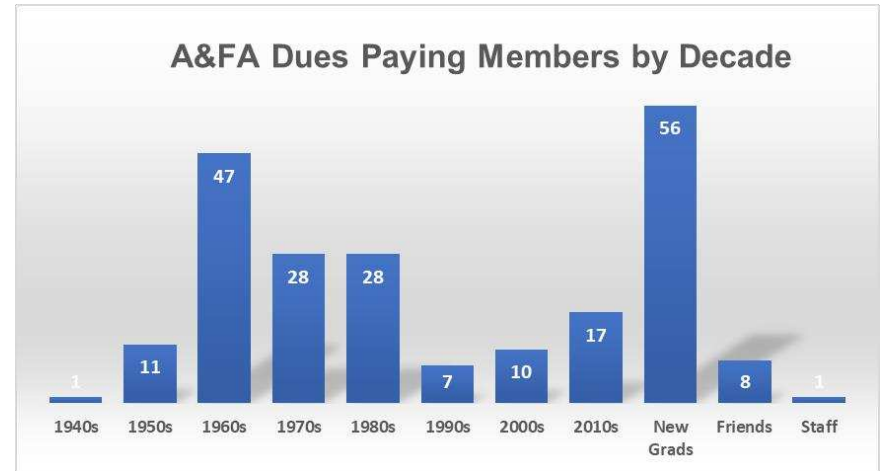
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2021 Goal (yes, it's still...): EVERY MEMBER RECRUIT ONE NEW MEMBER!

A&FA Overall Membership Trend

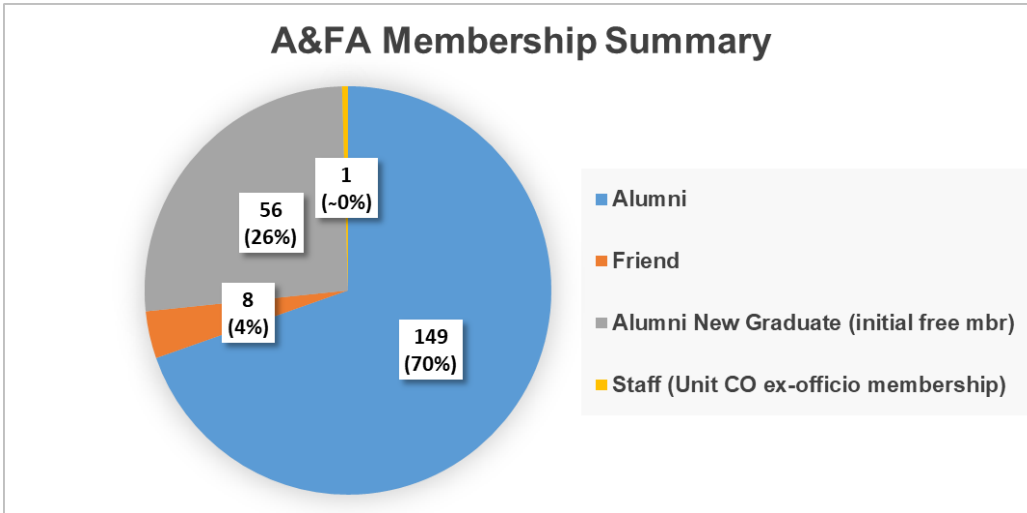


A&FA Dues Paying Members by Decade

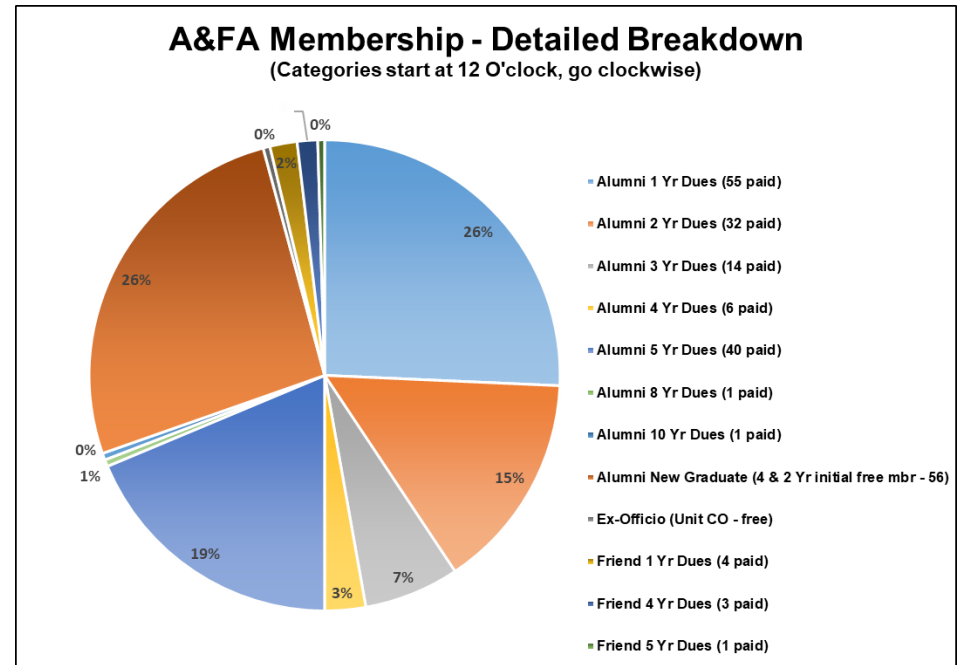


Note annual cyclical Membership trend over past few years due to missed January renewals and adding New Graduates in May + recruiting at Alumni Reunions.

A&FA Membership Summary



A&FA Membership - Detailed Breakdown
(Categories start at 12 O'clock, go clockwise)



Dues Payers: 149 (+3) Alumni + 8 (no change) Friends = 157 (+3) → (Δ) Since July 2020

Alumnus/Young Alumnus of the Year Update

- 2021 Nominations closed **15AUG**
 - Currently, received two (2) nomination for the Young Alumnus of the Year
 - ****Have not received any nominations for the Alumnus of the Year – NEED ASAP****
 - Communication via social media (Facebook), annual newsletter, and email
 - Estimated Voting Period – 16AUG-31AUG (dependent on nominations received), followed by notification of recipients
- Award Presentation
 - Once recipients are determined, notifications will be made and plaques ordered
 - Presentations during the 2021 Fall Ball

**MARQUETTE UNIVERSITY NROTC ALUMNUS OF THE YEAR &
YOUNG ALUMNUS OF THE YEAR GUIDELINES - 2021**

1. Purpose: To establish procedures which the Board of Directors of the Marquette NROTC Alumni & Friends Association, Inc. (A&FA) will use to select an Alumnus of the Year and a Young Alumnus of the Year.

2. Discussion: For the purpose of this guidance, “alumnus” shall mean both “alumnus” and “alumna” and “alumni” shall include alumnae. The Alumnus of the Year and the Young Alumnus of the Year will be awarded in order to honor and recognize individuals who have made significant contributions to their country through their active and reserve military service as well as their contributions to A&FA, the Seapower Leadership Association (SLA) and other community service organizations. The recipients will be recognized, typically at the Marquette NROTC’s Fall Ball. The procedures listed below will be the method used to determine the Alumnus of the Year and the Young Alumnus of the Year.

3. Action:
 - a. Eligibility:
 - 1) All nominees for both the Alumnus of the Year and the Young Alumnus of the Year must be commissioned by the Marquette University NROTC Program and have attended the university or cross-town affiliate (i.e., Milwaukee School of Engineering (MSOE) or University of Wisconsin-Milwaukee). All nominees may only be selected one time for each of the awards.
 - 2) Nominees submitted during the first ten calendar years following their commissioning will be considered for the Young Alumnus of the Year. The year of commissioning is counted as the first calendar year following commissioning.
 - 3) Alumni who have been a Young Alumnus of the Year may also be selected as an Alumnus of the Year in the years after they are no longer eligible for the Young Alumnus of the Year award.
 - 4) Nominees may not currently be stationed or employed with Marquette University NROTC nor may they be on the convening A&FA Board of Directors.

b. Selection Criteria:

- 1) It is important that nominees' overall contributions are considered when selecting recipients, since their individual contributions should serve as a model for current midshipmen.
- 2) Nominees' military service records and civilian accomplishments should be taken into account along with their contributions to A&FA, SLA, the Marquette University NROTC Unit, and any military and other community service organizations.
- 3) Young Alumnus of the Year: Candidates during their first 10 years after commissioning should have completed their initial training and first tour of duty. In addition to awards, nominators should include instances of candidates serving in billets above their rank or pay grade; duties beyond the scope of designator/MOS; military letters of commendation or appreciation; Navy "end of tour" awards; post-graduate military and civilian schools and degrees earned; service as an NROTC A&FA active member, committee member or class representative; and community involvement, such as Scouting, Boys & Girls Clubs, Big Brothers & Sisters, etc.; church responsibilities, veterans' associations, etc.; personal or family hardships overcome; difficult billets held and recognition outside the military.

c. Procedures and Timeline:

- 1) Nominees may be submitted by anyone who feels an alumnus' contributions have exemplified what an Alumnus of the Year or a Young Alumnus of the Year should be.
- 2) **Nominees must be submitted** on the following nomination form via email to A&FA at munrotcalumni@gmail.com by **15 August** of each year so that the selections can be either awarded or announced, typically at the Fall Ball, later in that year.

NOTE: Nominations do not automatically roll over from one year to the next year. Therefore, nominators **must resubmit** their nominees who have not been selected for the awards in the past during each of the subsequent years that the nominators want their nominees to be considered for the awards.

- 3) The Alumnus of the Year Award and the Young Alumnus of the Year Award will each be awarded to a maximum of one recipient for every year.
- 4) If there are no suitable nominees for either award, the award without suitable nominees will be suspended until the following year.

- 5) The A&FA Board of Directors will convene and compile a list of nominees in order to determine whether or not there will be a recipient for each award and who the recipients will be.
- 6) The Chairman of the A&FA Board will be responsible for tallying, or delegating the tallying to another Board member, the votes for Alumnus of the Year and for the Young Alumnus of the Year.
- 7) The A&FA Board of Directors must come to a majority opinion as to who they believe is the best candidate for each award. Ties will be resolved by the Chairman of the A&FA Board.
- 8) The **selections** must be made **by 1 September** to allow the recipients time to make their necessary travel arrangements.
- 9) If a recipient, or a representative of the recipient, is unable to be present at the Fall Ball to accept the award, the A&FA presenter of the awards will announce the recipient, typically at the Fall Ball, and coordinate the presentation of the award to the absent recipient.
- 10) The recipients will be considered the Alumnus of the Year and the Young Alumnus of the Year for the year of selection.

**Marquette University NROTC Alumnus or Young Alumnus of the Year Award
NOMINATION FORM**

Date Nomination Submitted: _____ 20__

Nominee: Name	Rank:	Class of:		
Mailing Address:	City:	State:	ZIP:	
Phone #:	E-Mail Address:			
Alt Phone #:	Alt E-Mail Address:			

Nominator: Name	Rank:	Class of:	<i>(Include rank and class only if applicable)</i>	
Mailing Address:		City:	State:	ZIP:
Phone #:	E-Mail Address:			
Alt Phone #:	Alt E-Mail Address:			
Relationship with Nominee:				

Nominee contributions to MU NROTC Unit, Sea Power Leadership Association (SLA) or Marquette Alumni & Friends Association (A&FA) (Use additional pages if needed):

Other nominee contributions to any military, Marquette University or other service organizations, and additional personal comments (Use additional pages if needed):

Nominee Military Service Record: Please begin a new page. **Use additional pages** for details on duty stations, deployments, combat action, awards, etc. *(Note: Nominees not selected in current year must be re-nominated in subsequent years in order to be reconsidered.)*

Nominees must be submitted on the following nomination form via email to A&FA at munrotcalumni@gmail.com **15 August 2021.**



Marquette University NROTC Alumni & Friends Association

Seapower Leadership Association

Communications

FaceBook 341 members

<https://www.facebook.com/groups/130634680316129/>
or search 'Marquette NROTC Alum Association'

Instagram 124 followers

[@mu_navy_rotc_alumni](https://www.instagram.com/mu_navy_rotc_alumni)

LinkedIn 175 members

<https://www.linkedin.com/groups/2948410>
or search 'Marquette NROTC Alum Association'

Twitter 18 followers

https://twitter.com/MU_NROTC_Alumni

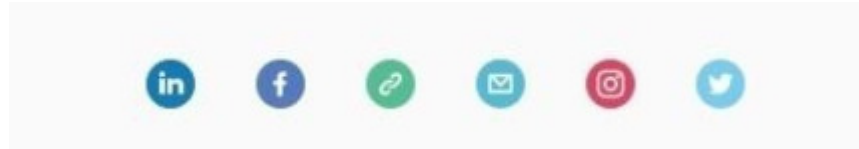
Website: <https://www.marquette-nrotc-alumni.org>

Email: munrotcalumni@gmail.com

Zoom meetings

Annual Newsletter

Social media links are at the bottom of every email



Email Campaigns

Audience: 737

Email Campaign \ (Date sent) \ **Opens** \ Clicks

Overall campaign results: **Opens: 40.4%** Clicks: 4.8%

- 05JUN21 "ZOOM" Last Minute Reminder Annual Mtg (04JUN21) **28.1%** 4.6%
- 05JUN21 "ZOOM" Annual Mtg & Open House (02JUN21) **35.9%** 2.3%
- 11DEC20 "ZOOM" Happy Hour (11DEC20) **26.8%** 2.4%
- 11DEC20 "ZOOM" Happy Hour (03DEC20) **28.7%** 1.3%
- 17NOV20 Alum & Young Alum 2020; "ZOOM" Mtg Reminder (Day of) **34.6%** 11.9%
- 17NOV20 Virtual Qtrly Board Mtg invite for (13NOV20) **31.5%** 2.1%
- 13NOV20 Virtual N/MC Birthday Ball 2020 invite (11NOV20) **35.4%** 2.7%
- 1stLt Brian Landers passing to Full A&FA (10SEP20) **46.2%** 8.7%
- 1st LT Brian Landers passing to classmates-2017 (18 total) (10SEP20) **36.4%** 9.1%
- Summer Newsletter – Full newsletter (22AUG20) **41.3%** 3.1%
- Summer Newsletter preview (17JUL20) **42.3%** 21.0%
- May 2020 Virtual Commissioning (12MAY20) **40.5%** 4.3%

Email service in use:

- gmail.com 261 (35%)
- aol.com 88 (12%)
- yahoo.com 72 (10%)
- hotmail.com 49 (7%)
- comcast.net 34 (5%)
- Other 233 (32%)

Unit Update – Aug 2021

CAPT Matthew Vandersluis

Aug

Unclassified



Agenda

- Upcoming Events
- New CO
- Incoming Class
- Space Refresh
- Alumni Funds expenditures (2020-2021)
- Plans for next Academic Year



Upcoming Events

- RDML Couture visit and CoC: 20 Aug 2021
 - Tour/briefings/CoC
- NSO Welcome aboard: 28 August
- Fall Semester (Marquette) 30 August
- FORCE. NSO Culminating event and picnic. 2 October
 - Location TBD.
- Madison/Badger Drill meet. 23 October
- Fall Ball 12 Nov.
 - Location TBD.



New Staff Arrivals

- CAPT Lonnie Appleget
- Seaman to Admiral and OCS
- SWO than lat to Helo Pilot
- Multiple tours in aviation
- Coming from CCSG 15 CoS
- Turnover underway



Incoming Class Demographics

- 12 new MIDN Candidates
 - 5 MSOE
 - 7 MU
 - 0 UWM
- 5 National Scholarship / 7 College Program
- 2 Marine Option / 10 Navy Option / 0 MECEP or STA-21



Alumni Funds Expenditures (last year)

- MIDN NSO Kits
- Gym Equipment
 - Weight and bar racks, core-trainers, Deluxe Squat Rack
- MIDN Study Coffee station
- Mid Term and Finals Fuel ups
- Grad Lawn Signs
- MIDN Coffee Mugs



Plans for next Academic Year

- NSO / Force / Picnic
- Leadership Conferences
- Balls
- Cross Town Parking passes
- Student Social events (midterms, finals, T-giving, X-mass, etc.)
- Drill meets / Shooting events
- Field Exercises (MO)
- Community briefings and get togethers (Fleet and Alumni)
- Alumni reunions / meet ups



Discussion and Questions



22 Budget	Spending Purpose (not natu	NOTES/Amplifying Info
3100	Uniforms	Unit polo-\$29, FORCE T-shirt - \$30, Shoe shine kit-\$15, unit mug- \$10, cold wx gloves-\$13, watch cap-\$20, NSO T-shirts- \$28, Uniform Maskes-\$5 Total/MIDN: \$100
500	Student social/cultural activi	FORCE, Alumni Open house, Pie Days, Bagel Days
2000	Domestic travel airfare	WINS, NAFAC, Naval Academy Leadership Conference
800	Domestic Travel Hotel	WINS, Notre Dame Leadership Conference
800	Domestic travel conference	WINS, NAFAC, Naval Academy Leadership Conference fee
500	Student Travel	Crosstown Parking
300	Misc Expense	Gift for Graduating senior.\$9 - 40/student allotted. E.g., ROR books: \$9, Wind wheels: \$25, Stethoscope: \$25, Marine Officers guidebook: \$40 . Assumed 10 students

MU NROTC Reunion Weekend Open House POA&M / Checklist



2022 1972-50th And possibly 1970 & 1971

This checklist has been co-developed to provide coordination between the NROTC Unit at Marquette University (MU) and the Marquette NROTC Alumni and Friends Assn. (A&FA) for the annual MU Alumni Reunion Weekend.

- L – Action Lead
- S – Supporting
- ✓ - Action Required

Plan of Action and Milestones (POA&M)	Unit	A&F A	Status
11 Months in advance			
Conduct review of recent Open House and identify lessons learned for improvement.	L	S	Per 2019 reunion
Update the annual POA&M / Checklist.		✓	7/18/20 & 1/26/21 & 2/14/2021 & 7/28/2021
Social media post (facebook)-11 months prior to reunion.			7/28/2021
6 months in advance			
Engage Alumni Reunion Class Reps to determine if they plan any unique events that involve the NROTC Unit or require support.		✓	
Start dialog with 50 th anniversary class rep (1972) to see if they will need any help or advice for the 50 th anniversary class events.		✓	
Start dialog with 51 st /52nd anniversary class reps (1970 & 1971) to see if their classes would like to attend.		✓	
Identify any special circumstances or desired events that will be a part of the NROTC Unit Open House/Alumni Reunion Weekend that require additional planning & coordination.		✓	
Develop POA&M details for special event, as required.	L	S	
Provide input on NROTC Unit and A&FA reunion related events schedule to MU administration / Alumni Weekend planning staff so these can be included in official schedules.	S	L	
Social media posts-6 months prior to reunion.		✓	
5 months in advance			
Social media posts-5 months prior to reunion.		✓	
4 months in advance			
Social media posts-4 months prior to reunion.		✓	
If Reunion/Open House will be virtual, Send e-mail to wild apricot e-mail list: re: in		✓	

**MU NROTC Reunion Weekend Open House
POA&M / Checklist**

person reunion will be virtual; zoom link to follow. (Coordinate with Mike and Phil)			
If Reunion/Open House will be virtual, notify class reps for C's of 1970, 1971, and 1972 to notify their classes.		✓	
3 months in advance			
Social media posts-3 months prior to reunion.		✓	
2 months in advance			
Social media posts-2 months prior to reunion.		✓	
Initiate detailed planning for Unit Open House / Alumni Reunion.	L	S	
Confirm plans for A&FA Corporate / All Members meeting:	S	L	
Time: usually 0900-1000.		✓	
Location: Seapower Library.		✓	
Teleconferencing equipment.		✓	
Unit desktop computer & screen in Seapower Library. Verify teleconference phone connectivity via connection in Supply Storeroom.		✓	
Confirm plans for buffet lunch, BBQ or picnic meal & beverages:	S	L	
Develop funding estimate for lunch buffet and beverages.	✓	✓	
A&FA fund lunch, soft drinks and bottled water.		✓	
A&FA coordinates alcoholic beverages. (5 cases of a variety of beers; contact Dick Leinenkugel Class of '80)		✓	
Confirm plans for Unit event hosting:	L	S	
Set-up of public spaces.	✓		
Identify sign-in table staffing (usually w/ stashed Ensigns). <i>(Could combine w/ Battalion emblematic merchandise sales table)</i>	✓		
Photographer? Midn PAO:	✓	✓	
Alumni Assn:			
Unit POC for RSVPs (including RSVP contact info) LT Canteberry.	✓		
A&FA Reunions POC for RSVPs (coordinate with Unit POC) Ed Taicsich / Email: munrotcreunions@gmail.com / Cell: (847) 714-3056.		✓	
Send out invitation to Unit Staff and Midshipmen for Open House.	✓	✓	
Create/update e-mail for approval to send to all alumni/class reps/coordinators wording with director of Comms. (Coordinate with Mike and Phil).		✓	
Designate midshipman point of contact for communications with Reunion Coordinator; Obtain midshipman point of contact for invitation flyer for NROTC Bulletin board.	✓	✓	
Create/update invitation flyer for website posting/attachment to all alumni/class reps e-mail.		✓	
Create/update invitation flyer for NROTC Unit bulletin board; send to CO / Unit staff Rep. (moved up from 1 month in advance).		✓	

**MU NROTC Reunion Weekend Open House
POA&M / Checklist**

Send out (email) to A&FA members and to all alums inviting them to the Unit Open House during the MU Reunion Weekend; request RSVPs/provide POC/ attach invitation flyer: specify in-person or virtual. <i>(Coordinate with Mike and Phil).</i>		✓	
Update Wild Apricot invite and send to all alumni. <i>(Coordinate with Mike and Phil).</i>		✓	
Post (Social Media) notices inviting A&FA members and all alums to the Unit Open House during the MU Reunion Weekend; request RSVPs/ provide POC: <i>specify if Reunion/Open House will be virtual, and provide Zoom link.</i>		✓	
Confirm A&FA funding available for proposed lunch buffet and beverages. Coordinate payment method with unit staff POC.		✓	
1 month in advance			
Social media posts-1 month prior to reunion.		✓	
Confirm plans are on track. Update RSVPs for Open House attendance; develop attendee planning number.	L	S	
Confirm provision of malt beverages. (5 cases of a variety of beers; provided by Dick Leinenkugel Class of '80).		✓	
Confirm NROTC Open House banners/signs are available and in good order; make/procure new signs if required.		✓	
Guest nametags, pens & Sharpie markers: verify enough available from previous year, or buy more. Consider unique sticker to identify A&FA Members, that would be put on their Open House nametag to be noticed by non-members.		✓	
Request A&FA membership list file from Membership Chair, so that A&FA members can be identified for nametag sticker at Open House (if used).		✓	
Plan for preparations of unit facilities to support Open House:	L	S	
Tubs for iced down beverages.	✓		
Tables for buffet.	✓		
Slideshow to display on big screen TV in Wardroom Other displays of unit activities? (Midn PAO:)	✓		
Coordinate Reunion year class Portholes loan from MU Archives (Contact Ms. Amy Cooper Cary or Ms. Katie Blank @ MU Library Archives).	✓		
Coordinate Unit military participation:	✓		
Unit Staff.	✓		
Attendance by "stashed" Ensigns / Second Lieutenants.	✓		
Invite current local Midshipmen to attend.	✓		
2 Weeks in Advance			
Confirm plans are on track. Update RSVP numbers.	L	S	
Order lunch buffet food, soft drinks & bottled water.	✓		
Provide payment / charge info to buffet vendor (Coord with A&FA Treasurer).		✓	
Confirm RSVP numbers for malt beverage amounts/mix; firm up order.	L	S	
1 Week in Advance			

**MU NROTC Reunion Weekend Open House
POA&M / Checklist**

Confirm plans are on track. Update RSVP numbers. Consider any final lunch buffet & beverage changes based on RSVP number/expected attendees. Place order with caterer based on RSVP count. If virtual, send e-mail with zoom link.	L	S	
Confirm set-up plans / access to the unit.	L	S	
Coordinate w/ MU Security to open Old Gym doors on Open House day by 0800.	L	S	
2-3 Days in Advance			
Set-up Seapower Library to support A&FA annual meeting:	S	L	
Teleconference phone (check out to ensure operation).		✓	
Desktop computer, projector & screen.	✓		
A&FA banners / poster boards, etc.		✓	
A&FA Membership forms for renewals and to sign up new members.		✓	
Annual "State of A&FA" (or similar newsletter handout) copies.		✓	
Print out alumni / visitor sign-in sheet with data collection entries for: name, class, service, address, phone and email contact info.		✓	
Alumni / A&FA Member database printout for manual verifications/ updates of alumni contact information.		✓	
Set-up NROTC Unit public spaces for Open House.	L	S	
Lunch buffet tables.	✓		
Tubs for iced beverages.	✓		
Porthole yearbooks for reunion year classes in separate room to avoid spills/damage (icw Archives staff oversight).	✓		
Hook-up and verify big screen TV Slideshow in Wardroom.	✓		
Stage small sign-in table for sign-in sheets & pens, A&FA membership list, nametags & markers.	✓		
Stage Midshipman Battalion Emblematic items sales table (MIDN PoC:)	✓		
Day Prior to Event			
Pickup, deliver & store malt beverages in NROTC unit.	L	S	
Post Open House banners/signs (hang outside at bottom of north sidewalk stairs on 16 th Street and over Old Gym Door, at rear entrance).	✓		
Send reminder e-mail with zoom link.		✓	
Morning of Event			
Pick-up bags of ice (A&FA will reimburse w/receipts).	✓		
Pick-up buffet lunch or take delivery.	✓		
Final preparations:	✓		
Ice down beverages.	✓		
Put out lunch buffet.	✓		
Move sign-in table and 2 chairs out into Old Gym public entry.	✓		
Ensure guest nametags, Sharpie pens, A&FA membership list, pens and unique sticker to denote A&FA members on their nametag are available on		✓	

**MU NROTC Reunion Weekend Open House
POA&M / Checklist**

sign-in table			
Staff the sign-in table at Unit public entry with 1-2 persons.	L	S	
During Event			
Sign in visitors at the table located at the unit entrance.	✓	✓	
Sell Midshipman Battalion Emblematic items (MIDN PoC to organize).	✓		
Urge alumni Recruit alumni to join A&FA; provide member form to fill out; collect form and payment.		✓	
Provide new member forms and dues or SLA donation payments to A&FA Membership Chair & Treasurer.		✓	
Post Event			
Cleanup / Remove banners & stow / pack-up / restore spaces.	L	S	
Collect alumni / visitor sign-in sheet with data collection entries.		✓	
Provide alumni / visitor sign-in sheet to membership chair to verify and/or make required updates to alumni database records.		✓	
Remove unused lunch buffet food items. Offer "leftovers" to stashed Ensigns and Midshipmen.	✓		
Remove unused malt beverages and any alcohol related advertising items from unit.		✓	
Send Letter of Appreciation to caterer and others who have made donations to the reunion event.		✓	
Elicit feedback from 50 th /51 st /52 nd anniversary class: likes/dislikes, positives/negatives, areas for improvements, etc.		✓	
Elicit feedback from Staff/Midshipman Battalion class: likes/dislikes, positives/negatives, areas for improvements, etc.		✓	

NOTES:

2021 Alumni Pillars



1. Alumni Recognition
2. Philanthropy
3. History & Tradition Preservation
4. Social Networking/Camaraderie
5. A&FA - NROTC Unit Engagement

IRS 501c(19) deductibility

"A war veterans' organization is one that satisfies both a membership requirement and a purpose requirement. To be eligible to receive tax-deductible contributions under IRC 170(c)(3), at least 90 percent of the members must be war veterans. Substantially all the other members must be veterans, cadets, or spouses, widows, or widowers of war veterans, veterans or cadets. "War veterans" are defined as persons who have served in the United States Armed Forces during the following periods of war:

- a. April 21, 1898, through July 4, 1902;
- b. April 6, 1917, through November 11, 1918;
- c. December 7, 1941, through December 31, 1946;
- d. June 27, 1950, through January 31, 1955;
- e. February 28, 1961, through May 7, 1975, in the case of a veteran who served in the Republic of Vietnam during that period;
- f. August 5, 1964, through May 7, 1975; and
- g. August 2, 1990, and ending on the date prescribed by Presidential Proclamation or by law."

