We thank you for your time spent taking this survey.
Your response has been recorded.

Below is a summary of your responses

HAA Clubs & Shared Interest Groups
Annual Report – Looking at FY23

We are excited to launch a shorter and streamlined HAA Clubs and SIGs Annual Report survey. Thank you for taking the time to answer the questions; the information provided will be compiled into a comprehensive Annual Report Booklet with detailed appendices on each Club and SIG. The FY23 booklet will be available in Fall 2023.

The deadline for submission is May 18, 2023.

Step 1:
Review the checklist to gather data. You can also preview questions via this PDF.

Step 2:
Determine who will be completing this survey on behalf of your organization. That person will be responsible for inputting data and attesting to its accuracy. The completion of this year's survey is expected to take less than 30 minutes.

Step 3:

Submit survey responses and save a copy of your organization's report submission as a PDF.

NOTES:

- Each Club and SIG should submit only ONE Annual Report.
- If the President, is not the submitter, forward the PDF of responses to them.
- Direct any question to your [Staff Liaison](#).

The Annual Report is a requirement of all HAA Clubs and Shared Interest Groups – please complete it by Thursday, May 18 to remain in good standing with the University.

Name of person completing the FY23 Annual Report Survey:

Tara Mello

Email of person completing the FY23 Annual Report Survey:

tara@bemellomedia.com

Role of person completing the FY23 Annual Report Survey:

○ President
○ Vice President
○ Secretary
○ Treasurer
○ Paid Staff
○ Other

Our organization is a:

○ Club

○ Shared Interest Group (SIG)

Club Name:

Select | Harvard Club of Alabama   ⌄ |

Organizational Structure & Leadership

What is the organization's current nonprofit status?

○ 501(c)3 - Charitable organization

○ 501(c)4 - Social Welfare

○ 501(c)6 - Business League

○ 501(c)7 - Social Club

○ International nonprofit

○ Undeclared

○ Don't know

What is the start date of the organization's fiscal year?

○ January 1

○ July 1

○ September 1

○ Other (please specify)

[   ]

Share the timing for these processes for the organization

Month (i.e. 1 for January; 7 for July; 9 for September; and if no formal date, enter the number zero)

When does the nominations process begin?

`0`

When do elections occur?

`0`

When do new officers start?

`7`

What is the organization's presidential structure?

- ○ President only
- ○ Co-presidents that start/end together
- ○ Co-presidents with staggered terms

What is the presidential term length?

- ○ 1 year
- ○ 2 years
- ○ 3 years
- ○ Other
- ○ No term limit

President information:

Name

Tara Mello

Degree and Year

EXT '93

Email

tara@bemellomedia.com

Start Date (MM/DD/YYYY)   07/01/2021

How many volunteers have been actively involved in your operations in the past 12 months? *Enter as a whole number.*

12

Who does your organization communicate with?

	Yes	No
HAA Staff Liaison	○	○
HAA Appointed Director for Clubs and SIGs	○	○

What is the name of your HAA Staff Liaison?

○ Sara Aske
○ Dia Combas
○ Kim Delehanty
○ Joslyn Evans
○ unknown

Bylaws & Governance

The status of the organization's bylaws is:

○ We have bylaws, but they are not reviewed regularly.
○ We have bylaws and our leadership team reviews them regularly to ensure relevance and applicability.
○ We do not have bylaws or we cannot locate our bylaws.

Did the organization update its bylaws in the past 12 months?

O O

Yes No

Do you use any OTHER governance documents to support organization operations (e.g. role descriptions, board manual)?

O O

Yes No

Operations - Financials

Does the organization have an active bank account?

O Yes
O No

Did the organization file a 2021 or 2022 tax return?

O Yes
O No
O Not yet
O Not applicable
O Don't know

Did the organization generate revenue in 2022?

○ Yes

○ No

What was the organization's total revenue for the 2022 calendar year (dues, event fees, sponsorships, donations, etc.)?
Enter as a whole number with no symbols, commas, or decimals.
(e.g. 10000 for $10,000)

5236

How are organization REVENUES earned?
Please enter a whole number, adding up to 100%. For rows that do not apply, leave as 0

Membership fees	27
Events	23
Sponsorships (Corporate or individual donations to underwrite specific events or programs)	0
Donations (Monetary gifts NOT in the form of dues or sponsorships)	50
Merchandise Sales	0
Investment Income	0
Other	0
Total	100

Did the organization have expenses in 2022?

○ Yes

○ No

What was the organization's total expenses for the 2022 calendar year (staffing, events & programs, general expenses, charitable endeavors, etc.)?
Enter as a whole number with no symbols, commas, or decimals.
(e.g. 10000 for $10,000)

3170

How are organization funds SPENT?
Please enter a whole number, adding up to 100%. For rows that do not apply, leave as 0

Staff salary and/or benefits	0
Events and programs	7
Charitable endeavors	0
General expenses	30
Banking and Insurance	63
Gifts	0
Other	0
Total	100

Operations - Insurance, Legal, and Regulatory

Which type(s) of insurance does the organization have?
Check all that apply

☐ General Liability

☐ Directors & Officers (D&O)

☐ Neither

How does the organization approach legal and regulatory affairs?

	Yes	No
We have a system in place for reacting to legal matters if a situation arises.	○	○
We engage legal counsel proactively.	○	○
We consult legal counsel reactively.	○	○
Our legal counsel is drawn from our membership.	○	○
We monitor local regulations that may impact our online endeavors.	○	○

Events & Programming

For the remaining sections, please do your best to answer for fiscal year 2023 (July 1, 2022 - June 30, 2023)

Provide the number of events held / to be held from July 1, 2022 - June 30, 2023?

Please enter as a whole number with no commas or symbols

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How frequently does the organization offer events?

- ○ Several times a week
- ○ Weekly
- ○ About twice a month
- ○ Monthly
- ○ Bi-Monthly
- ○ Quarterly
- ○ Infrequently
- ○ None in the past 18 months

What types of events did the organization offer? (Check all that apply)

- ☐ Annual event
- ☐ Allyship
- ☐ Networking/social gatherings
- ☐ Moderated/panel discussions
- ☐ Career and professional development programs
- ☐ Interactive workshops
- ☐ Faculty speakers
- ☐ Alumni speakers
- ☐ Non-Harvard speakers
- ☐ Book discussion groups
- ☐ Other

Which of the following are priority programming areas or initiatives for the organization? (Check all that apply)

- ☐ Admissions interviewing
- ☐ Business and environment

- [ ] Community service
- [ ] Diversity, equity, inclusion & belonging (DEIB)
- [ ] Entrepreneurship
- [ ] Healthcare
- [ ] Industry
- [ ] Innovation
- [ ] Leadership
- [ ] Lifestage and career
- [ ] Mentoring
- [ ] Parenting
- [ ] Peer support
- [ ] Social enterprise
- [ ] None

The organization has participated — or will participate — in the following HAA-enabled programs between July 1, 2022 and June 30, 2023.

	Yes	No
Alumni Day	○	○
Early College Awareness	○	○
Global Networking Night	○	○
Harvard Moves	○	○
Harvard Prize Book	○	○
Mentoring program for students	○	○
SIG Meetups (on campus during Reunions)	○	○
Speakers Bureau	○	○
Summer Community Fellowship Program	○	○
Sponsor Scholarship (degree-seeking student)	○	○
Sponsor Scholarship (local leader takes a course)	○	○
The Game: Harvard-Yale Viewing Party of Tailgate	○	○

		Yes	No
Welcome to Your City		◯	◯

How does the organization promote its events? (Check all that apply)

☐ Organization website

☐ Targeted email to promote a specific event

☐ Organization newsletter

☐ Harvard This Week newsletter

☐ Alumni.harvard.edu events calendar

☐ Text messaging

☐ Mailings of printed material

☐ Social media channels

☐ Local community collaboration

Which types of post-event communications does the organization send? (Check all that apply)

☐ Survey

☐ Thank you

☐ Information on additional resources

☐ Information on organization membership

☐ Information on volunteer opportunities with organization

☐ No follow-up communications sent

How does the organization evaluate the relative success of its events? (Check all that apply)

☐ Sponsorship of event/program

☐ Registration numbers

- ☐ Attendee numbers (yield)
- ☐ Breakeven or made money from event/program
- ☐ Number of first-time attendees
- ☐ Number of new members
- ☐ Survey feedback from attendees
- ☐ Innovation/new approach to an event or program
- ☐ Publicity associated with event/program

What partners has your organization collaborated with since July 1, 2022? (Check all that apply)

- ☐ Harvard Club
- ☐ Harvard SIG
- ☐ Harvard department, office or center
- ☐ Harvard student group
- ☐ Other Ivy alumni organizations
- ☐ Other
- ☐ None

Which service opportunities does your organization participate in?

	Yes	No
We are aware of service opportunities within the Harvard University community.	○	○
We have designated volunteers responsible for coordinating service opportunities or for specific activities (e.g. Coordinator for Harvard Prize Book or Summer Fellowship Chair).	○	○
We are aware of service opportunities in our local community.	○	○
We participate in local community service projects (e.g. shelter volunteering, school reading programs,	○	○

	Yes	No
Habit for Humanity)		
Other	○	○

Communications

Does the organization have a website?

○ Yes

○ No

What is the organization's website URL address?

> https://hcbirmingham.clubs.harvard.edu/index.html

How does the organization engage with members?

☐ Email newsletter

☐ Social Media

☐ Phone calls

☐ Snail (paper) mail

☐ None of the above

For which purposes does the organization send email communications? (Check all that apply)

☐ Newsletter

☐ Event promotion

☐ Post-event highlights

☐ Membership campaigns

- ☐ Volunteer opportunities/recruitment
- ☐ Leadership elections
- ☐ Other

How often does the organization send newsletters/general outreach?

- ○ Weekly
- ○ Bi-weekly
- ○ Monthly
- ○ Bi-monthly
- ○ Quarterly
- ○ Bi-annually
- ○ Annually

How many people are in the organization's database or master Excel spreadsheet?

1663

Which of the following social media platforms does the organization use? (Check all that apply)

- ☐ Facebook
- ☐ Twitter
- ☐ Instagram
- ☐ LinkedIn
- ☐ YouTube/Vimeo
- ☐ WeChat
- ☐ WhatsApp
- ☐ No social media/group messaging used

Membership

Which of the following best describes the organization's membership structure?

○ No membership (e.g. all alumni in database are considered "members")

○ Free membership (e.g. all alumni in database are invited to opt-in and those who opt-in are considered members)

○ Paid membership

○ Mix of free and paid membership

What are the organization's membership numbers?

Total number (#) of paid members

> 80

Total number (#) free members

> 10

Total number (#) other members

> 1573

Please indicate which memberships are free or discounted

	Free	Discounted
New alumni (0-1 year out)	☐	☐
Recent alumni (more than 1 year out)	☐	☐
Current students	☐	☐
Seniors	☐	☐

I attest that the information provided is accurate to the best of my ability.
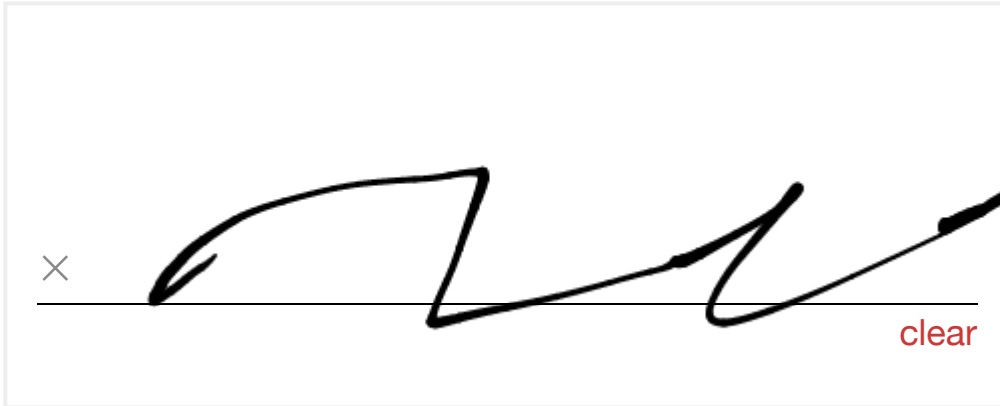
My role or title

President

Thank you for taking the time to complete the Annual Report Survey. This information is valuable to both the HAA and fellow Harvard Clubs and SIGs.

Please record any changes in your organization's leadership through this Volunteer Leadership Form. It is also available year-round in Officer's Lounge under the "Directories" heading.

Lastly, remember to save your responses as a PDF on the next screen.

Thank you for your leadership and partnership!