



Please find your survey overview with answers here. Thank you for your time and responses.

The Club and SIG Team at Harvard Alumni Association

Below is a summary of your responses

[Download PDF](#)

Thank you for taking the time to complete your 2022 HAA Club and Shared Interest Group Annual Report. We hope that this will be a helpful strategic planning exercise for your club or SIG, and the information provided is invaluable in guiding how the Harvard Alumni Association supports clubs and SIGs.

Each Club and SIG should submit only ONE Annual Report. It's recommended that the report be filled out collaboratively by your board in order to facilitate information sharing and to provide the most comprehensive report.

[Click here for a PDF of the report.](#) The report form is somewhat lengthy and it's recommended that you use the PDF as a worksheet before entering your report into the digital form.

You will be prompted to print a copy of your report submission for your records before proceeding to the Officer Listing form. Both forms are required.

The deadline for submission is July 15, 2022.

BASIC INFORMATION

YOUR NAME:

Tara Mello

YOUR EMAIL ADDRESS:

tara@bemellomedia.com

YOUR CLUB OR SIG ROLE (e.g. President, Secretary, etc.)

President

OTHERS WHO CONTRIBUTED TO PREPARING THIS REPORT (names and roles):

Raymond Osbun (Treasurer), Loren Gary (Secretary)

OUR ORGANIZATION IS A:

- Club
- Shared Interest Group (SIG)

CLUB NAME:

Harvard Club of Alabama

WEBSITE:

- We have a website. Our URL is:

<https://hcbirmingham.clubs.harvard.edu/>

- We do not have a website

PLEASE SELECT ALL OF THE PROGRAMS IN WHICH YOU HAVE PARTICIPATED SINCE JULY 1, 2021 (select all that apply)

- Early College Awareness Program
- Global Networking Night
- Harvard Alumni Allyship Series Events
- Harvard Prize Book
- Mentoring program for students
- Mentoring program for alumni
- Nonprofit Board Recruitment Fairs
- SIG Meetups (on campus during Reunions)
- SIG Showcases

SIG Showcase

Speakers Bureau

Summer Community Service Fellowship Program

Sponsor local educators to take courses at Harvard

Sponsor local non-profit leaders to take courses at Harvard

Sponsor scholarship(s) administered by Harvard

Sponsor scholarship(s) administered locally

The Game: Harvard-Yale Viewing Party or Tailgate

Welcome to Your City

Non-scholarship fundraising (list causes)

Other

None of the above

PLEASE SELECT ALL THE INFORMATION SOURCES YOUR ORGANIZATION HAS UTILIZED SINCE JULY 1, 2021 (select all that apply)

alumni.harvard.edu

Broadcast emails from other Clubs and/or SIGs

Emails from fellow Club and/or SIG leaders

Emails from HAA leadership (Executive Director Philip Lovejoy, President Vanessa Liu, etc.)

Harvard Alumni Gazette email newsletter

Harvard@Home/Harvard This Week event email newsletters

Monthly update email from our HAA Staff Liaison

news.harvard.edu

Officers Lounge resource site (officerslounge.clubs.harvard.edu)

HAA online sessions (please list any particular favorites)

Other Harvard source (please list)

None of the above

GOVERNANCE

BYLAWS (please select all that apply)

We have bylaws, but they are not regularly reviewed.

We have bylaws and our board undertakes a regular review of the bylaws to ensure relevance and applicability. (enter the date of your last bylaws review)

July 13, 2021

We do not have bylaws or we cannot locate our by-laws

PLEASE UPLOAD A COPY OF YOUR CURRENT BY-LAWS

Harvard Club of Alabama Bylaws_Amended 0721_Final.pdf

0.2 MB

application/pdf

DO YOU USE ANY GOVERNANCE DOCUMENTS IN ADDITION TO YOUR BYLAWS TO SUPPORT YOUR OPERATIONS (e.g. role descriptions, board manual)?

Yes (list)

Articles of Incorporation

No

ARE YOU WILLING TO SHARE THESE DOCUMENTS TO BE PART OF A RESOURCE LIBRARY FOR CLUBS AND SIGS?

Yes

No

PLEASE UPLOAD DOCUMENTS HERE.

Articles of Incorporation executed.pdf

0.5 MB

application/pdf

REVENUE & FINANCIAL MANAGEMENT (select all that apply)

- Our Board has planned financial reviews at least annually.**
- We have defined processes in place for strategic financial planning, auditing and money management.**
- We report on our finances to membership at least annually for financial transparency.**
- We report on our finances to membership for financial transparency, but not every year.
- We are financially stable.**
- We believe our financial model is sustainable.
- Other
- None of the above

DID YOU GENERATE REVENUE IN 2021?

- Yes**
- No

WHAT WAS YOUR TOTAL 2021 ANNUAL REVENUE (dues, event fees, sponsorships, donations, investment income, etc.)?

5774.00

PLEASE INDICATE THE PERCENTAGE OF REVENUE (as a percentage of 100) GENERATED IN THE FOLLOWING CATEGORIES:

THE FOLLOWING CATEGORIES. Best guesses are okay.

Dues	31
Events	29
Sponsorships (Corporate or individual donations to underwrite specific events or programs)	0
Donations (Monetary gifts NOT in the form of dues or sponsorships)	40
Merchandise Sales	0
Investment Income	0
Other	0
Total	100

DID YOU RECEIVE ANY GIFTS IN KIND IN 2021?

Yes (please list)

No

COMMENTS REGARDING ANNUAL REVENUE:

DID YOU HAVE EXPENSES IN 2021?

Yes

No

WHAT WERE YOUR TOTAL 2021 ANNUAL EXPENSES (website expenses, email expenses, mailings, etc.)?

PLEASE INDICATE THE PERCENTAGE OF EXPENSES (as a percentage of 100) GENERATED IN THE FOLLOWING CATEGORIES. Best guesses are okay.

Website expenses (hosting fees, licenses, design, etc.)

Email expenses (broadcast email tools, etc.)

Social Media tools & services	0
Events	64
Charitable endeavors (scholarships, Prize Book, Summer Community Service Fellowship, public service projects, etc)	0
Staff salary and/or benefits	0
Bank fees	0.6
Credit Card processing fees	0
Insurance	0
Printing & mailing	0
Merchandise for sale	0
Gifts for members (please list)	0
<input type="text"/>	
Gifts for non-members (please list)	0
<input type="text"/>	
Other	
<input type="text" value="Accounting Fees"/>	35.4
Total	100

BOARD LEADERSHIP (select all that apply)

We have an established an Executive Committee/Board.

We do not have an established Board.

Other

BOARD LEADERSHIP (select all that apply)

Board meets regularly.

Board meets irregularly.

- Board does not meet.
- Board has a full slate of Officers: President, Vice President (President-Elect), Treasurer, Secretary, relevant VPs (membership, events, communications, etc).**
- Each Board member fulfills a distinct role/responsibilities
- Board responsibilities fall on the shoulders of one or two Board members.
- Board undertakes regular self-assessment to identify skills/expertise needed.**
- We abide by term limits.
- Other

BOARD SUCCESSION (select all that apply)

- Board has a succession plan for each officer.
- Elections are held at regular intervals.
- We have a nominating committee that oversees elections.
- The election process for new Board members is well-defined and transparent to the membership.**
- Board election process is not well-defined.
- We convene an annual meeting of our full membership.**
- Other**

Election process applies only to Officers of the Board. Board members are appointed.

GOAL SETTING (select all that apply)

- Board undertakes tactical objectives but conducts no strategic goal setting.
- Board sets achievable long-range strategic goals and follows through effectively.
- Board sets long-range strategic goals but has trouble achieving them.**
- Board sets achievable short term strategic goals and follows through effectively.**
- Board sets short-term strategic goals but has trouble achieving them.
- Board regularly monitors its progress in achieving its**

goals.

Board conducts annual re-evaluation of its goals with its members.

Other

None of the above

Please provide any notes or comments related to your governance:

OPERATIONS

HOW MANY VOLUNTEERS (INCLUDING BOARD MEMBERS) HAVE BEEN ACTIVELY INVOLVED IN YOUR OPERATIONS FROM JULY 1, 2021 THROUGH JUNE 30, 2022?

DO YOU HAVE VOLUNTEERS WHO ARE NOT ON YOUR BOARD?

Yes

No

VOLUNTEER ENGAGEMENT & PARTICIPATION (select all that apply)

Board manages our operations and events.

We have an extensive network of volunteers managing our operations and events.

We have a small pool of volunteers outside of the Board to assist with operations and events.

We actively recruit recent alumni into volunteer positions.

We recruit active volunteers into leadership positions.

We publicly recognize the contributions of our volunteers.

Other

SCHOOLS & SCHOLARSHIPS Schools & Scholarships Committees are established by the Harvard College Admissions office to recruit and evaluate applicants to Harvard College. (select all that apply)

- We have no Schools & Scholarship committee or representative affiliate.
- We have active participation of Schools & Scholarships committee members in our club and vice versa.
- Our members actively participate in Schools & Scholarships activities, and interview admissions candidates annually.**
- We are in regular communication with our admissions representative.**
- Our local Schools and Scholarships Chair is a board member.**
- Other

ADMINISTRATION (select all that apply)

- Volunteers/Board member(s) handle all administrative tasks on an ad hoc basis.**
 - We have a paid administrator.
 - We have clearly documented role/job descriptions.**
 - We have clearly documented administrative processes.
 - We are on good administrative footing.
 - Our administrative plan is regularly reviewed. (enter date of last review)
-
- None of the above

LIABILITIES (select all that apply)

- We take ad hoc measures to define and limit liability for individual events (e.g. liability waivers requested for participants in events).
- We have a process in place to identify and understand specific liabilities.
- We have a process in place to identify and understand potential/evolving liabilities and have developed plans to prevent or mitigate them.
- Our by-laws contain clauses relating to mitigating liabilities.**
- Club/SIG conducts a periodic assessment of a full range of insurance coverage to limit potential legal liability; general, D&O, E&O.
- We currently have insurance coverage. Our provider

is:

- None of the above

REGULATORY & LEGAL (select all that apply)

We are registered with local/state/national authorities.

We are registered as a non-profit organization.

We annually file documents to maintain our non-profit status.

We have a system in place for undertaking reactive measures to legal matters in the event a situation arises.

We consult legal counsel reactively.

We engage legal counsel proactively as opportunities present to optimize the organization.

Our legal counsel is drawn from our membership.

We are aware of new or upcoming regulations that may impact our online presence. (past examples include GDPR and PSD2 SCA; if yes, please describe)

Other

- None of the above

HAA PARTNERSHIP (select all that apply)

We are not in communication with our HAA Staff Liaison

We are in communication with our HAA Staff Liaison.

We are in communication with our volunteer HAA Director for Clubs and SIGs.

We are not in communication with our volunteer HAA Director for Clubs and SIGs.

- None of the above

HAA STAFF LIAISON (select one)



Sara Aske

**Dia
Combas**

Kim Delehanty

Joslyn
Evans

Unknown

VOLUNTEER HAA DIRECTOR FOR CLUBS AND SIGS (enter the name of your Director; if unknown, please indicate that)

Jenni Hammer

Please provide any notes or comments related to your operations:

We have not been in regular contact with anyone in the HAA office after Shae Callahan's departure, due to the lengthy time for her position not being replaced and the lack of staff in that office in general over the 2021-2022 academic year. We only recently learned that Dia was her replacement and look forward to having regular contact.

PROGRAMMING

NUMBER OF EVENTS BETWEEN JULY 1, 2021 and JUNE 30, 2022 (please approximate if necessary):

11

HOW MANY **DIFFERENT** INDIVIDUALS (not total attendance numbers) DO YOU ESTIMATE JOINED AT LEAST ONE EVENT DURING THAT TIME PERIOD? Best guesses are okay.

100

EVENTS (select all that apply)

We hold regular recurring events - such as Annual Meeting/Dinner, student send-off/new admit events, Harvard-Yale Game Viewing Parties, Global Networking Night, SIG Meetup events, etc.

We hold one-off events in addition to recurring ones - tours, dinners, speakers, etc.

Other

None of the
above

EVENT PLANNING (select all that apply)

We plan events in an ad hoc way.

We have established guidelines/processes for events planning.

We have a committee structure for event planning and implementation.

We periodically review and evaluate existing programs.

We debrief after events to identify best practices and opportunities for future events.

We regularly vet new event ideas for adoption.

Other

EVENT MARKETING (select all that apply)

We send event communications to alumni on a per-event basis.

We send regular announcements of multiple upcoming events.

We publish a calendar at the beginning of the season for major events, with additional notices throughout the year.

We send post-event evaluations or follow up communication to event attendees.

We market events to our full alumni constituency (not just members).

Other

Please provide any notes or comments related to your programming:

COMMUNITY SERVICE

COMMUNITY IMPACT (select all that apply)

We are aware of service opportunities within the Harvard University community.

We are aware of service opportunities in our local community.

We participate in local community service projects (e.g. shelter volunteering, school reading programs, Habitat for Humanity).

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 have created local community service programs.

Other

None of the above

Please provide any notes or comments related to your community service activities:

MEMBERSHIP AND OUTREACH

WHAT IS YOUR CURRENT MEMBERSHIP? (approximate numbers are okay)

MEMBERSHIP RECRUITMENT (select all that apply)

We use our HAA-supplied alumni list/database to recruit members.

We target recent/new-to-the-area alumni each fiscal year for recruitment.

We maintain a high member retention rate.

We follow up with lapsed members to encourage them to rejoin.

We actively recruit new members each year.

We rely on peer-to-peer outreach to seek new members.

Other

None of the above

DO YOU CHARGE MEMBERSHIP DUES?

Yes

No

We have both dues and non-dues membership options.

COMMUNICATION (select all that apply)

We communicate with members via mail. (enter number of mailings between July 1, 2020 and June 30, 2021; estimates are OK)

We communicate with members via email. (enter number of broadcast emails sent between July 1, 2020 and June 30, 2021; estimates are OK)

We communicate with members via text.

We communicate with members via WhatsApp.

We communicate with members via WeChat.

We communicate with members via Vopr.

We communicate with members via another messaging service or app. (please list)

We regularly communicate with/engage non-member alumni.

Our communications include marketing for events our organization is sponsoring or cosponsoring.

Our communications include marketing for events sponsored by other Harvard Clubs and/or HAA SIGs.

Our communications include HAA-sponsored events.

Our communications include other Harvard events.

Our communications include non-event Harvard content.

Our communications include public service opportunities organized by our organization.

Our communications include locally-sourced public service opportunities.

Our communications include Harvard-sourced public service opportunities.

Our communications promote other Harvard Clubs or HAA SIGs.

Our communications highlight or profile members of our alumni community.

We find that word-of-mouth awareness is key to successful communication.

Other

WEBSITE PLATFORM (select)

- AlumniMagnet
- Squarespace
- Weebly
- Wix
- Wordpress
- Other

WHICH ALUMNIMAGNET FEATURES DO YOU USE? (check all that apply)

- Broadcast email
- eCommerce
- Event registration
- Membership

ON WHICH ALUMNIALUMNI FEATURES WOULD ADDITIONAL TRAINING BE HELPFUL TO YOUR HEAD ADMINISTRATORS?

- Broadcast Email
- Content
- eCommerce
- Event Registration
- Membership Processing
- Tips & Tricks
- User Consolidation & Groups

WHAT PAYMENT/ECOMMERCE PROCESSOR DO YOU USE?

WHICH EVENT REGISTRATION TOOL DO YOU USE?

SOCIAL MEDIA (select all the platforms on which you have a presence)

SOCIAL MEDIA (select all the platforms on which you have a presence)

Facebook (share URL)

Twitter (share handle)

Instagram (share handle)

LinkedIn (share URL)

Clubhouse (share group name)

Other (list)

We do not use social media

HOW MANY PEOPLE ARE ON YOUR EMAIL LIST?

BROADCAST EMAIL TOOL (select)

AlumniMagnet

MailChimp

Salesforce

Other

COLLABORATION (select all that apply)

We have collaborated with one or more Harvard Clubs on an event or engagement opportunity since July 1, 2021.

We have collaborated with one or more HAA SIGs on an event or engagement opportunity since July 1, 2021.

We have regular/repeat collaborators within the club and SIG community. (please list)

We have collaborated with a Harvard department, office, or center since July 1, 2021. (please

We have collaborated with a Harvard department, office, or center since July 1, 2021. (please list)

We have collaborated with a Harvard student group since July 1, 2021. (please list)

We have collaborated with alumni organizations from other universities (e.g. Ivy network) since July 1, 2021. (please list)

Other

We have not collaborated with other organizations this year

Please provide any notes or comments related to your membership and outreach:

In this final section, please reflect back on your answers to summarize your accomplishments from the past year and your areas of focus for the coming year.

What have been your greatest successes, transitions, or areas of growth since July 1, 2021? Please share as much detail re: the programs, initiatives, or events you'd like to highlight as you're willing.

The 2021-2022 year has been a challenge for a Club, but is ending on the upswing. The virtual events that were so successful last year have not attracted attendees this year. We attribute this to folks being ready to get out in real life, but getting regional events going in real life has also proven difficult. People say they are interested in both virtual & in-person events with enthusiasm, yet getting them to show up has been a challenge. HAA's staff departures and lack of prompt replacements, both in the main office and with Alumni Magnet support has made operations (particularly website, newsletter & membership management) even more challenging than in the past. We interviewed more students than ever (nearly 20% more) and had 9 students be accepted either EA or Regular decision, yet were disheartened that only 3 decided to attend. On a positive note, we've had several new board members come on board mid-way through the year, and now that they've gotten in the swing of things, they are putting forth great ideas and enthusiasm that is contagious.

What strategies did you employ to achieve that success, transition and/or growth?

We are a Club with a large geographic area, which can make it hard to unite people. We rely on regional reps to help reach out in their areas. This year we started quarterly meet-ups in the regions. Initially, we had very little attendance, but now that we are on the 3rd time hosting these events, they seem to be picking up steam.

Would you be willing to talk with a Club or SIG that is experiencing a challenge in an area in which you have had success?

Yes

No

What are the most pressing challenges that you'd like to address in the coming year and beyond?

Our large geographic area makes it hard to pull people together. We need to strike a balance with ways for alumni throughout the state to be engaged regardless of their location, while still creating opportunities for the larger populations of alumni in certain cities/regions to engage in person.

Please share any relevant learnings as a result of this exercise:

[Empty text box]

Please share your feedback on this Annual Report form. We appreciate your input!

It would be helpful to use a system that allows the saving of the report and returning to it at another time so it does not need to be entered in one session or risks being lost with internet connectivity issues.

Would you like to receive strategies and best practices aggregated from Clubs and SIGs around the world to help you move the dial in your areas of focus in the coming year?

- Yes
- No

Please select the areas about Governance that you would like strategies for

	GOVERNANCE
BY-LAWS	<input checked="" type="checkbox"/>
FINANCE MANAGEMENT	<input checked="" type="checkbox"/>
REGULATORY	<input checked="" type="checkbox"/>
LEGAL	<input checked="" type="checkbox"/>
BOARD DEVELOPMENT	<input checked="" type="checkbox"/>
GOAL SETTING	<input checked="" type="checkbox"/>

BY-LAWS

STRATEGIES*

*Strategies are not listed in order of importance

GOVERNANCE: BY-LAWS

1. Ensure by-laws contain a conflict of interest policy and a statement about non-partisan nature of the organization.

2. Ensure by-laws contain definitions, roles, election guidelines/processes, removal of officer/member processes, etc.
3. Give all new board members a copy of the by-laws
4. Set a pre-determined interval for reviewing by-laws
5. Post the by-laws on website/in a way that they are easy to find with other Club/SIG records
6. Ensure Board has a current copy of by-laws and has recently reviewed them/signed a copy saying they will adhere to them
7. Designate a committee person as responsible to periodically review the by-laws
8. Convene regular discussion to refresh the by-laws
9. Task a Board member with understanding what by-laws address, and serving as the advisor regarding by-laws to the Board

FINANCIAL MANAGEMENT

STRATEGIES*

*Strategies are not listed in order of importance

GOVERNANCE: FINANCIAL MANAGEMENT

1. Make a review of Club/SIG finances a permanent agenda item in the Board Meetings of Club/SIG, rather than event to event or on an ad hoc basis
2. Use Legal representation from Board to file non-profit tax paperwork (or use other service) if Club/SIG is 501(c)3 or international equivalent
3. Send financial report to all Board members, and give a report at AGM to all members for full transparency
4. If a dues paying organization is a 501(c)3 or international tax exempt equivalent, remind members that dues are tax deductible

5. File tax returns regularly if you are a 501(c)3 or international equivalent, even if your organization is under the \$10,000 threshold
6. File Articles of Incorporation, if applicable
7. Issue tax receipts for donations, if applicable
8. Separate the Club /SIG endowment from operating funds, and have an advisor manage the Club/SIG endowment
9. Appoint a financial advisor—a member of the Club or SIG or an independent auditor

REGULATORY



STRATEGIES*

*Strategies are not listed in order of importance

GOVERNANCE: REGULATORY

1. File non-profit documents with state/provincial/federal authorities as required
2. Consult with Director, as needed
3. Appoint treasurer or other designee to oversee the filing of non-profit status documents
4. Identify someone within the Club/SIG with the skills/expertise to take fullest advantage of opportunities

LEGAL



STRATEGIES*

*Strategies are not listed in order of importance

GOVERNANCE: LEGAL

1. Identify within membership or proactively recruit an alumnus as potential legal Counsel to provide pro bono services
2. Have attorney familiar with state/local regulations review by-laws and other governing documents
3. Maintain a list of attorneys with different specialties as needed for legal counsel

BOARD DEVELOPMENT

STRATEGIES*

*Strategies are not listed in order of importance

GOVERNANCE: BOARD DEVELOPMENT

1. Add definitions, roles, election/nomination processes, conflict of interest guidelines, and other procedures to by-laws
2. Create a Board calendar with the schedule of Board meetings
3. Begin thinking about who will succeed you once you accept an officer position, and use the Leadership Succession Toolkit as a resource
4. Use all events as opportunities to meet and get to know members and what motivated them to join the SIG or Club
5. Utilize past presidents as a resource
6. Build connections to groups on campus (SIGS)
7. Provide specific opportunities for people to get more involved
8. Implement a succession plan by adding second-in-command positions to top 3-4 positions and fill them with those slated to take over next term (an "apprenticeship" that would allow these officers-elect to shadow the appropriate officer)
9. Make current Board members responsible for finding, training, grooming, recruiting, and mentoring successors to be potential nominees in the future
10. Establish a Nominating Committee that has transparency to Executive Committee and membership but that is not contiguous with management team so they can nominate people
11. Assess frequent attendees for more involvement
12. Develop an outreach program specific to cultivating leadership (through open house, community meeting, survey, etc.)
13. Build connections to relevant groups on campus (both groups for students from a particular geography and groups thematically related to SIGs)

14. Make succession planning an "ongoing" Board Priority

15. Make each volunteer role small and distinct

GOAL SETTING



STRATEGIES*

*Strategies are not listed in order of importance

GOVERNANCE: GOAL SETTING

1. Add a strategy session to the annual agenda for Board Meetings
2. Review the Annual Report as a team to build a shared understanding of where your organization is and to collectively decide the areas of focus for the coming year
3. Establish a yearly Board retreat to plan for the year
4. Communicate goals to members, and provide status updates at AGM and through communications channels
5. Invite feedback from all members on agenda setting. Invite non-members to participate in Club/SIG agenda setting.
6. Appoint a person or small group of people to focus on the execution of strategic priorities
7. Create metrics to help measure success in achieving goals
8. Survey members/general alumni to understand if strategic efforts are having desired impact

Please select the areas about Operations that you would like strategies for

	Operations
CLUB/SIG LEADERSHIP	<input type="checkbox"/>
COMMUNICATION	<input type="checkbox"/>
ALUMNI ENGAGEMENT	<input type="checkbox"/>
VOLUNTEER ENGAGEMENT/PARTICIPATION	<input type="checkbox"/>
SCHOOLS AND SCHOLARSHIPS	<input type="checkbox"/>
ADMINISTRATION	<input type="checkbox"/>
LIABILITY	<input type="checkbox"/>
HAA RELATIONSHIP	<input type="checkbox"/>

CLUB/SIG LEADERSHIP



STRATEGIES*

*Strategies are not listed in order of importance

OPERATIONS: CLUB/SIG LEADERSHIP

1. Add a conflict of interest policy to your bylaws (See sample on Officers' Lounge)
2. Ensure that the bylaws reflect standard operating procedures of elections of the Board
3. Create a schedule of mandatory Board activities, including an annual meeting, retreat, board orientation
4. Begin thinking about who will succeed you once you accept an officer position and use the Leadership Succession Toolkit as a resource
5. Make a personal ask of someone you think would be good leadership for the Club/SIG
6. Make succession planning an "ongoing" Board priority
7. Utilize past presidents and Board members as a resource; develop 'senior commons room' to capture accumulated knowledge of volunteers rotating off the Board
8. Choose leadership without regard to race, gender, age, sexual orientation, disability, etc.
9. Ensure Board/Leadership contains graduates of each school to foster One Harvard environment and broaden the volunteer pool
10. Ensure board roles and responsibilities are clearly defined—i.e., have job descriptions
11. Discuss having 3-4 positions with second in command, someone who is already slated to be the next Officer
12. If a Club, have representatives from as many SIGs as possible on the leadership team. If a SIG, have representatives from as many geographic areas (Clubs) as possible on the

SIG, have representatives from as many geographic areas (Clubs) as possible on the leadership team.

13. Have potential younger/newer volunteers join a board sub-committee as a way for the individual to see first-hand the benefits and for them to begin a working relationship with the board.
14. Encourage/enforce the constant incorporation of new members to the leadership group (i.e. Board). This can be stated in the Bylaws or done informally, but Club/SIGs should commit themselves to incorporating one/several new member/s (be it a young or more senior alumnus/a) to the Board as to bring new energy and act as a revitalizer.
15. Assess frequent attendees for more involvement
16. Hold a community meeting or a leadership open house for anyone interested
17. Ensure Board members are responsible for training and mentoring their successors
18. Review the HAA Leadership Planning Toolkit (on the Officers' Lounge) as a Board.
19. SIGS: Use the SIG chapter guide (found on the Officers' Lounge) to articulate the relationship between chapter heads and SIG Board
20. Establish a nominating process: Nominating Committee has transparency to the Executive Committee and membership, is not contiguous with the current management team so people can be nominated; there is a procedure for election/nomination that is written down and adhered to; and Committee undertakes a periodic self-assessment

COMMUNICATION

STRATEGIES*

*Strategies are not listed in order of importance

OPERATIONS: COMMUNICATION

1. Identify someone with media/ communication expertise (if possible)
2. Invest in volunteers and enable them to take ownership
3. Develop a strategy for gathering data/addresses/ or contact information in your area
4. Request an updated alumni list from the HAA
5. Send annual email to all alumni to update their profile
6. Establish procedures for communicating regularly
7. Organize communications and establish goals
8. Send out surveys to membership and general alumni so you understand the interests of your audience
9. Reach out to members and ask how they want to be communicated with (paper, text, email)
10. Identify social media custodians to maintain social media tools and to explore new media
11. Develop a consistent voice across all social and communications channels
12. Develop segmented messaging for different audiences, as relevant
13. Employ member testimonials, videos of events, etc. that highlight the diverse alumni member base of the Club/SIG.
14. Create "new to town" materials highlighting area Clubs/SIGs to email link to new graduates moving to your area.
15. Use peer to peer marketing to attract alumni to Clubs and SIGs. Example, encourage Clubs and SIGs tap into the senior class committee and graduate schools.
16. Create a brand narrative for the Club/SIG and connect it back to Harvard.

17. Gather editorial calendars for Harvard news outlets pitch stories. Send Club/SIG newsletters/updates to Harvard publication editorial staff and HAA staff.
18. Include anecdotes and facts that illustrate the Club/SIG's work and tie it back to the mission and Harvard.
19. Reflect on what the Club/SIG does that makes it unique. Suggested frames include: The Club/SIG is a community of leaders from a wide variety of fields; The Club/SIG members come together to build the Harvard network in different ways.
20. Recognize the value of collaboration of distinct positions

ALUMNI ENGAGEMENT

STRATEGIES*

*Strategies are not listed in order of importance

OPERATIONS: ALUMNI ENGAGEMENT

1. Offer a variety of events and other opportunities for alumni engagement
2. Increase the number of repeat attendees by developing a communication plan to let engaged alumni know about events
3. Develop a process for keeping and updating a contact list so as to understand who the engaged alumni are
4. Use data visualization and other tools provided by the HAA to develop alumni engagement strategies
5. Use events as an opportunity to gather updated emails
6. Track event attendance
7. Keep membership records
8. Contact HAA about using the full suite of AlumniMagnet tools
9. Use email and website analytics to understand engagement behavior and help determine programming relevance to different demographics
10. Create a feedback loop after events to understand success
11. Focus on the broad reach of the Club/SIG—showcase diversity of members, programs, activities, etc. Feature alumni/ae from various schools as focal point for all important categories of content, membership and donations. Tell a story about a member and reflect on what makes the Club/SIG unique.
12. Follow up with non-renewing members to find out why they did not renew

VOLUNTEER ENGAGEMENT/PARTICIPATION

STRATEGIES*

*Strategies are not listed in order of importance

OPERATIONS: VOLUNTEER ENGAGEMENT/PARTICIPATION

1. Actively recruit recent alumni and those new to the area to help expand volunteer engagement.
2. Proactively reach out to alumni to engage more folks in the community
3. Add a check-off box on all mailings for people who want to volunteer
4. Be clear and transparent about the Club/SIG's expectations for a volunteer, and what the volunteer can expect from the job
5. Begin considering succession issues and recruiting new volunteers early in the term
6. Actively recruit volunteers by asking people to volunteer / Personal invitation to get involved by Club and SIG President
7. Use your website (AlumniMagnet or otherwise) for targeted communications about volunteer opportunities
8. Have mentors for new volunteers so they feel comfortable in position
9. Monitor and manage volunteers to best utilize their talent and experience
10. When work of a volunteer becomes counter-productive, address the issue quickly and with sensitivity. Be willing to make decisions based on what's best for the Club/SIG
11. Distribute handouts at all events that give alumni the opportunity to evaluate the event, suggest program ideas, update contact information, and volunteer for the Club/SIG
12. Consider 'rebranding' and revamping the Club/SIG program offering to improve the image, perceived value, and relevancy of Club/SIG to target audiences

SCHOOLS AND SCHOLARSHIPS

STRATEGIES*

*Strategies are not listed in order of importance

OPERATIONS: SCHOOLS AND SCHOLARSHIPS

1. Contact the College Admissions Office (617-495-1551) to find out if your region has a Schools & Scholarships Committee and the process for becoming involved.
2. Create a Board position for S&S chair in order to build communication between Club and Admissions
3. Establish a Prize Book award to introduce talented young people to the opportunities available at Harvard and recognize their scholastic and personal achievements (i.e., contact the local high school principal and guidance counselor to introduce the Harvard Prize Book program and to select the student to receive the award)

ADMINISTRATION

STRATEGIES*

*Strategies are not listed in order of importance

OPERATIONS: ADMINISTRATION

1. Evaluate what administrative tasks are and what is/is not being done
2. Distribute administrative tasks amongst Board or, if possible, secure resources for a part-time paid position
3. Look at the skills gaps in your organization to strategically recruit for them. Use competency framework in Officer's Lounge to help identify skills needed and level of proficiency needed
4. Create job descriptions for all volunteers
5. Maintain physical and digital files, including all passwords for social media accounts
6. Consult regularly with treasurer to understand the impact of financial decisions before they are made
7. Create reimbursement guidelines if a volunteer uses own funds
8. Consider sharing administrators across Clubs/SIGs so volunteers can focus on other tasks

LIABILITY



STRATEGIES*

*Strategies are not listed in order of importance

OPERATIONS: LIABILITY

- 1. (Re)Write the by-laws so that it includes rules of the organization that are based on current practices
- 2. Have a budget or expense plan for getting insurance or liability coverage for you Club or SIG
- 3. Talk to Risk Strategies or other insurance provider about Director and Officer Liability insurance

HAA RELATIONSHIP



STRATEGIES*

*Strategies are not listed in order of importance

OPERATIONS: HAA RELATIONSHIP

- 1. Review HAA staff, support and services on HAA website in order to understand how to best take advantage of the knowledge and resources available at the HAA
- 2. Develop a relationship with the HAA volunteer appointed Director who is responsible for supporting/advising/mentoring your Club/SIG
- 3. Participate in ALC or regional leadership meetings
- 4. Utilize the Officers' Lounge website for resources and best practices

5. Participate in the full spectrum of HAA-sponsored programming
6. Gather editorial calendars for Harvard news outlets pitch stories. Send Club/SIG newsletters/updates to Harvard publication editorial staff and HAA staff.

Please select the areas about Programming that you would like strategies for

	Programming
FREQUENCY OF EVENTS	<input type="checkbox"/>
EVENT PLANNING	<input type="checkbox"/>
COMMUNICATION	<input type="checkbox"/>

FREQUENCY OF EVENTS



STRATEGIES*

*Strategies are not listed in order of importance

PROGRAMMING: FREQUENCY OF EVENTS

1. Think about the timing of events and location of event venues to reach different audiences
2. Create a schedule of events for the year and assign volunteers to organize at least one

event/activity

3. Club/SIG Board includes a VP of Programming, with designated volunteers for each of the events, who manages a schedule of events and a standing Events Committee responsible for organizing all events
4. Take advantage of HAA-sponsored annual programs
5. Survey members about how frequently they want to attend events, and the optimal event timing

EVENT PLANNING

STRATEGIES*

*Strategies are not listed in order of importance

PROGRAMMING: EVENT PLANNING

1. Utilize HAA Event Planning Template (from Officers' Lounge) and/or create Club/SIG specific event planning template to help ensure consistency and predictability in event planning
2. Survey alumni population regarding what types of events interest them
3. Utilize HAA Speakers Bureau to schedule Faculty Lectures (for domestic Clubs/SIGs only)
4. Develop contingency plans for each event
5. Use data to determine programming based on different demographics
6. Train successor/have a volunteer shadow the programming role
7. Create an after-event one-pager so that someone could pick up responsibility for that event in the future
8. Actively encourage "joint" events that exploit "intersecting" bonds & identify opportunities for cross-promotion/cross-pollination between and amongst Clubs and SIGs
9. Co-partner with locally relevant groups (other Universities, similar clubs or associations).
10. Change the focus on connection rather than belonging; this impacts how we think about "membership", for example
11. Be agile and flexible – give multiple ways to connect (a multi-channel approach)
12. Record webinars and other events and make available at convenience of alumni
13. Encourage spontaneous meetings via Facebook or apps, for social events
14. Use collaborating with other alumni groups to enhance value
15. Bring together recent graduates to do a networking session
16. Reach out to Harvard Centers or individual faculty to create connections
17. Think of doing 'salon' events to build smaller communities within your Club/SIG

COMMUNICATION



STRATEGIES*

*Strategies are not listed in order of importance

PROGRAMMING: COMMUNICATION

- 1. Club/SIG hosts and regularly updates a website that publishes a regular calendar of events
- 2. Ensure events are pulled into the HAA Global calendar (via AlumniMagnet website or through HAA eVents request)
- 3. Club/SIG develops event communication across a variety of platforms: website/email/social media/snail mail
- 4. Follow up each event with pictures posted on website/social media
- 5. Solicit feedback from attendees on events

Please select the areas about Community Service that you would like strategies for

COMMUNITY SERVICE

- IMPACT WITHIN THE HARVARD COMMUNITY
- IMPACT WITHIN THE LARGER COMMUNITY
- COMMUNICATION

IMPACT WITHIN THE HARVARD COMMUNITY



Image:Community service impact within the Harvard community

STRATEGIES*

*Strategies are not listed in order of importance

COMMUNITY SERVICE: IMPACT WITHIN THE HARVARD COMMUNITY

- 1. Host an event to welcome and connect with current students working, studying, or living in your area
- 2. Utilize toolkits for Early College Awareness

3. Build relationships with relevant student organizations on campus to further Club and SIG activities
4. Fund a Summer Community Service Fellowship (SCSF) to provide a grant to a Harvard undergraduate working with a nonprofit host organization in your local community or area, and mentor the students you are sponsoring
5. Invite local Harvard students to shadow your members during one of the School's breaks
6. Create Winterships for students
7. Expand scope of an existing program, such as Prize Book
8. Look at former participants in service opportunities to recruit for further involvement

IMPACT WITHIN THE LARGER COMMUNITY

STRATEGIES*

*Strategies are not listed in order of importance

COMMUNITY SERVICE: IMPACT WITHIN THE LARGER COMMUNITY

1. Design occasional service opportunities that respond to community need and tap into the interests and connections of others
2. Find volunteers to take on ad-hoc community service events
3. Organize volunteers to respond during a local crisis
4. Use the HAA's Early College Awareness Program as an entry point into community service
5. Appoint Public Service Chairs/Public Service Ambassadors in your Club/SIG
6. Build long-term engagement through systematized programming
7. Steward existing relationships to build community
8. Build relationships with established non-profits and link to ambassador role
9. Establish a signature public service event or recognition award

COMMUNICATION

STRATEGIES*

*Strategies are not listed in order of importance

COMMUNITY SERVICE: COMMUNICATION

COMMUNITY SERVICE: COMMUNICATION

1. Create targeted messaging for Community Service events
2. Use existing page on website to explain Community Service activities
3. Keep website updated with pictures and blog of Community Service events/activities
4. Create a value proposition for getting involved in Community Service
5. Use social media channels to promote event/activity before/during/after
6. Coordinate with local press to get publicity before/after event
7. Focus communications on impact in the community
8. Build explicit focus on community impact communications into the Club's/SIG's communications role (if one exists)

Please select the areas about Outreach that you would like strategies for

	OUTREACH
RECRUITMENT	<input type="checkbox"/>
CLUBS AND SIGS EVENTS	<input type="checkbox"/>
MEMBERSHIP (FOR A DUES PAYING CLUB)	<input type="checkbox"/>
WEBSITE	<input type="checkbox"/>

RECRUITMENT



STRATEGIES*

*Strategies are not listed in order of importance

OUTREACH: RECRUITMENT

1. Make a member of the Board responsible for membership recruitment
2. Collect data as to who is on the membership list and start adjusting programming and outreach in to response to what segments of alumni might be underrepresented/missing
3. Be intentional about reaching out to alumni of graduate schools in your marketing to make them feel welcome
4. Analyze the data to reach out to new people proactively and to (former) members who are not engaged with the Club or SIG
5. Develop a process to understand why people are leaving and what Clubs/SIGs can do about it
6. Develop a tracking mechanism to measure the progress of strategies
7. Develop the capacity to do more sophisticated analysis of members and their preferences

to adjust programming

8. Ensure the composition of the Board reflects the diversity of the alumni pool
9. Use events to recruit new members; follow up with non-member alumni and invite them to join
10. Compare data visualization with alumni demographics to identify areas of opportunity
11. Have a member of a graduate/professional school recruit their school's alumni as members
12. Send a "we'd love to have you re-join" letter for those who have not yet renewed
13. Think about the demographics of your Club/SIG and recruit board that is reflective

CLUBS AND SIGS EVENTS



STRATEGIES*

*Strategies are not listed in order of importance

OUTREACH: CLUBS AND SIGS EVENTS

1. Use the HAA-provided alumni list as a key element to build contact list
2. Create a social media platform for the Club/SIG
3. Develop a communication strategy that is suited to the organization given its demographics and geography/virtual nature
4. Partner with Ivies or other organizations to get the word out
5. Build a feedback strategy for events
6. Consider paper mailing once a year

MEMBERSHIP (FOR A DUES PAYING CLUB)

STRATEGIES*

*Strategies are not listed in order of importance

OUTREACH: MEMBERSHIP (FOR A DUES PAYING CLUB)

1. Create different levels of membership
2. Communicate regarding upcoming events (via email) continuously
3. Use social media to show camaraderie of past events
4. Consider setting pricing so as not to be a deterrent to attendance
5. Suggest a category of membership for parents of current Harvard students
6. Develop a clear value proposition so that when the Club/SIG is soliciting membership alumni understand the tangible and intangible values of belonging to the network or participating in events
7. Distribute a benefits statement based on the level of participation of the alumnus
8. Review demographic and event data to know where the group's strengths and weaknesses are
9. Consider high profile/signature "members only" event as an incentive to become a member.
10. Communicate the value proposition to alumni actively
11. Work to understand the retention rate and seek to address the factors that cause members to not renew
12. Develop a plan to expand membership and create "stickiness" to membership
13. Administer a "customer service" survey (online) every 1 or 2 years

WEBSITE



STRATEGIES*

*Strategies are not listed in order of importance

OUTREACH: WEBSITE

- 1. Contact HAA about using its website platform or create own site
- 2. Identify dedicated volunteers to manage the website
- 3. Take fullest advantage of tools your site offers, including data analytics
- 4. Run reports to identify people who have moved into the area



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