HARVARD
Alumni Association

HAA BEST PRACTICES HANDBOOK

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INTRODUCTION

This handbook brings together best practices from Harvard Clubs and Shared Interest Groups (SIGs) worldwide as well as provides important information from the HAA. Please note that several of the topics covered may be Club or SIG specific and are labeled as such.

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I. BENCHMARKS & STATISTICS

1. CLUBS AND SIGS

Current Harvard Club and SIG network:

- There are 188 Harvard Clubs in more than 70 countries around the world.
- There are 40 HAA approved Shared Interest Groups
- The U.S. to international Club ratio is approximately 55:45.
- These Clubs are linked to the HAA by 35 HAA Directors for Clubs and SIGs.

The HAA uses the HAA President's Annual Report Form to collect information on Club membership, governance, and events. The following statistics are based on the responses we received as of November 3, 2011. These results represent 136 Harvard Clubs and 21 SIGs completing the 2011 annual report (68% participation)

Median Club membership: 142 members
55 Clubs <100 members
34 Clubs 100 – 200 members
30 Clubs 200 – 500 members
15 Clubs >500 members

Median Club participation rate: 11.5% (club membership / total alumni in area)

Average Club/SIG dues: US $45 for General Member

Events per year:
58 percent of Clubs (78) host 1–10 events
23 percent of Clubs (31) host 10–15 events
6.7 percent of Clubs (9) host 15–20 events
3.7 percent of Clubs (5) host 20–30 events
3 percent of Clubs (4) host 30–40 events
3 percent of Clubs (4) host 50+ events

Event partnering: 55% of Clubs and SIGs partner with other organizations on events

Staff:
3% of Clubs and SIGs have a full-time paid administrator (4)
21.6% of Clubs and SIGs have a part-time paid administrator (29)

Program Participation:
2011 Alumni Leadership Conference – 169 attendees
6/21/11 Global Networking Night – 30 Cities, 3,500 registered
2011 Global Month of Service – 40 Cities, 106 opportunities
2011 Prize Book – 1,600 Prize Books sold through HAA and Coop
2011 Speakers Bureau Program – 43 Club and SIG events
2011 Summer Community Service Fellowship – 17 Clubs & 1 SIG

II. GOVERNANCE

1. MISSION STATEMENT

Every Harvard Club should have a formal mission statement that is a clear and succinct representation of its purpose for existence.

SAMPLE (HARVARD CLUB OF MINNESOTA):
The mission of the Harvard Club of Minnesota is to build the community of Harvard's University-wide alumni in Minnesota, to assist Harvard applicants and students from Minnesota, and to promote the goodwill of the University locally.

This mission aims to foster:

- fellowship, networking, and support among University alumni;
- a greater sense of connectedness with Harvard;
- services of benefit locally that also serve the University in fulfilling its own mission; and
- interviewing and/or support of students applying to, and attending Harvard University, and returning or moving to Minnesota.

The Club's mission is enabled by a Board and Officers representing not only the College but also a broad range of Harvard Schools and experiences, who work with the Harvard Alumni Association and all the Harvard Graduate School Alumni Organizations in Cambridge to provide alumni with news, information, events, programs, and opportunities to serve."

SIGs are required to generate a mission statement as part of the HAA approval process and as outlined in the SIG Policy.

2. TERM LIMITS

Club/SIG officers usually serve one or two-year terms, with elections taking place at either the Annual Meeting or the Board Meeting in May or June. To maximize alumni involvement and to avoid volunteer burnout, it is strongly recommended clear succession planning be put into place. In particular, the HAA recommends that presidents serve no more than two consecutive terms. In accordance with the Club Operating Guidelines, Club Presidents may not serve more than a three-year term, without discussing their succession plan with the HAA and with the Club's Regional Director. For many Clubs/SIGs, the term of office begins on July 1 of each year and ends June 30 of the succeeding year.

3. SUCCESSION MANAGEMENT

For the long-term health of your Club/SIG, it is absolutely vital that your Club/SIG's leadership pay significant attention to succession management. Searching for your replacement should be the first and last job of every Club/SIG officer. Once you accept an officer position, you should begin thinking about who will succeed you. Succession planning must occur on an ongoing basis.

When looking for a replacement, evaluate what drew you to accept your officer position. You may find that information helpful in finding another alumnus with the same motivation for volunteering.

As a leader, it is important to appoint others to leadership roles—no matter how small. Giving others a sense of responsibility or ownership over an event links them to the Club/SIG and will help you in identifying future leaders.

4. VOLUNTEER MANAGEMENT

Identifying Volunteers

A successful Club/SIG is always on the lookout for committed volunteers. Techniques used to find and involve new volunteers include:

- A check-off box on all mailings for people who want to volunteer;
- 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;
- A concise description of each Club/SIG job, including tasks and time involvement;
- Publish this on the Club/SIG's website, newsletters, handouts, etc. The clearer you are about the Club/SIG's expectations for a volunteer, and what the volunteer can expect from the job, the easier it will be to place someone in the role;
- Small, one-time-only jobs, such as staffing a registration table, are good jobs for new volunteers. Acquainting a new volunteer with a "micro-commitment" begins the process of grooming future Club/SIG leaders; and
- New officers will be great ambassadors for their role when they are fresh. Begin considering succession issues and recruiting new volunteers early in the term.

Retaining & Rewarding Volunteers

Keeping and retaining volunteers is easier when the Club/SIG has momentum. Momentum is more likely to occur when the Club/SIG follows established procedures, encourages new ideas, ensures volunteers are clear on their roles and what they need to do, and spreads work over many shoulders.

Ideally, the role of volunteer management should be the chief responsibility of the President (or President-Elect). Keeping track of volunteers enables the President to know when an officer needs help, who is suffering from "burn-out," and who feels "wasted" in their volunteer position.

One key to retaining volunteers is thanking them often, publicly, and in a format fitting to the occasion. This is a low-cost, and often no-cost, way to improve volunteer relations. Never underestimate the power of a sincere public thank you at a Club/SIG event, an email of gratitude, or a handwritten note to renew alumni commitment.
Some suggestions for recognizing and rewarding volunteers include:

- List board members' names in the annual newsletter, on Club/SIG letterhead, and invitations;
- Verbally acknowledge committee members at events;
- Thank individuals for their contributions privately and frequently;
- Print committee member names in event programs;
- Follow up volunteer activity with thank-you letters;

- Present small tokens of appreciation (e.g., Harvard-related gifts) for outstanding service;
- Host an "end of year" party for all active volunteers;
- Request HAA Certificates of Appreciation for long-serving volunteers (see below), and present them at Club/SIG events; and
- Nominate volunteers for HAA Clubs Committee Outstanding Contribution and Recognition Awards, HAA Awards, HAA Medal (see below.)

HAA Certificates of Appreciation
To assist Clubs/SIGs in recognizing loyal alumni volunteer service, the HAA produces embossed certificates of appreciation signed by the University President and the HAA Executive Director. Two types of certificates of appreciation are available, one for outgoing Club/SIG Presidents and the other for Club/SIG officers with a long record of service. Certificates are suitable for framing and are traditionally presented by the board to outgoing Club/SIG Presidents at a Club/SIG function such as an annual meeting.

Certificates should be ordered at least six weeks in advance of the date of the Club/SIG presentation. To order a certificate of appreciation, contact the Clubs & SIGs Office at Clubs@harvard.edu, (800) 654-6494 (U.S.), or (617) 495-3070 (international).

HAA Clubs Committee Awards
The Clubs Committee, part of the HAA Board of Directors, presents two awards each February at the Alumni Leadership Conference during the Winter Meeting of the Board. The Contribution Award honors individuals who provide exemplary service to a Harvard Club or SIG, and the Recognition Award honors Clubs and SIGs that have organized exceptional programming. The recipient information is published in *Harvard Magazine*. Nomination forms are available through the Clubs & SIGs Office and are due by mid-December.

HAA Award
The purpose of the HAA Award is to recognize outstanding service to Harvard University through alumni activities and to encourage continued commitment to Harvard in the future. Devoted service may be reflected in significant commitment to a Club, SIG, Schools and Scholarships Committee, Class, Fund or other activity substantially benefiting Harvard University. For complete information and nomination forms, go to: *http://alumni.harvard.edu/haa/about/awards*

HAA Medal
The principal objective of the awarding of the Harvard Medal is to recognize extraordinary service to Harvard University. Extraordinary service can be in as many different areas of University life as can be imagined, including teaching, fundraising, administration, management, generosity, leadership, innovation, labors in the vineyards. For information and nomination forms, go to: *http://alumni.harvard.edu/haa/about/awards*

Problems with Volunteers
There is an old adage that "you can't fire volunteers." Yet sometimes the work of a volunteer can become counterproductive to an organization or the morale of other volunteers. Such situations require a great deal of finesse. The HAA suggests the following course of action:

1. Quietly gather the facts and evaluate the complaints.

2. Is the volunteer aware of dissatisfaction with their performance or behavior? If not, privately inform them. Work together to set concrete steps for improvement.
3. Is the volunteer's performance or attitude connected to lack of training or mentorship, or to outdated expectations for the role? Can this be remedied?
4. Can the volunteer be gracefully transferred to a less demanding yet equally prominent role? Or a role more appropriate for his or her abilities? In many instances, redirecting a volunteer's energy and focus will benefit both the Club/SIG and the volunteer.
5. If the volunteer is unwilling to step down, can the board eliminate their role?
6. If the volunteer holds an officer position, you will have to follow the dismissal policy outlined in your Club/SIG's constitution.
7. If your Club/SIG's constitution does not contain a dismissal policy, you can use the dismissal policy contained in the parliamentary authority specified by your constitution.

5. SCHOOLS & SCHOLARSHIPS COMMITTEES (CLUBS)

Many Clubs have active Schools & Scholarships (S&S) Committees that work with the Harvard College Admissions Office to interview applicants to the College. The alumni interviews are an important part of the entire process of admissions; Club members who interview applicants provide invaluable assistance to the College while serving as representatives of Harvard to the local community.

While many Schools & Scholarships Committees reside within the local Club, there are areas in which the S&S Committee is a separate organization. Clubs should contact the College Admissions Office (617-495-1551) to find out if their region has a Schools & Scholarships Committee. If a committee exists, encourage its members to join the Club. If an S&S committee does not exist, work with the Admissions Office to establish one.

III. PROGRAMMING

1. TYPES OF EVENTS

Successful programming for Harvard Clubs and SIGs tends to fit into the following categories:

- **Education:** Educational programming ranges from hosting a speaker at a Club/SIG event, going on a "field trip" such as a museum visit, or sponsoring online programs.
- **Professional Networking:** Depending on Club/SIG demographics, programs can be developed to target specific professional groups. Recent graduates are particularly on the lookout for good networking opportunities.
- **Service (Clubs):** By offering opportunities to give back to the local community through service programs, you can attract more members, provide unique programs, and develop and strengthen Harvard's presence in your community.
- **Social Interaction:** All Club/SIG events, regardless of format, should encourage social interaction among members. Some, such as holiday parties and reunion events, will be purely social.

2. EVENT PLANNING TIMELINES

The HAA advises creating a timeline and checklist for every event. Here is a basic sample:

PRE-EVENT LOGISTICS	**Date Completed**
Establish event goal(s), including anticipated attendance	
Establish event leadership	
Arrange a speaker (if a speaker event)	
Confirm event date and time	
Determine location	
Determine cost structure	
Outline onsite staffing needs	
Set RSVP date (10 business days prior to event)	

PRE-EVENT MARKETING	**Date Completed**
Include a "save the date" on Club website and/or in Club newsletter	
Market event on Club/SIG website (10–8 weeks out)	
Market event in Club/SIG newsletter (10–8 weeks out)	
Broadcast email invitation (4 weeks out)	

2 WEEKS PRIOR TO THE EVENT	**Date Completed**
Confirm speaker arrangements	
Confirm onsite staffing	
Confirm timing of event	

Confirm catering with venue	
Confirm audiovisual requirements with venue	
Confirm Club/SIG officer to make introductory remarks	
Confirm event timing (e.g., with key event volunteers, speaker, etc.)	
Prepare registration materials (nametags, membership forms, pens, attendee list)	
Determine table seating, if necessary	

ON SITE

Set up registration table
Test audiovisual requirements with venue
Confirm Club/SIG officer to make introductory remarks
Confirm event timing (e.g., with key event volunteers, speaker, etc.)
Prepare registration materials (nametags, membership forms, pens, attendee list)
Determine table seating, if necessary

AFTER THE EVENT	**Date Completed**
Send thank you notes (host, key event volunteers, speaker, etc.)	
Send a list of attendees to appropriate Club/SIG officers, such as the membership chair	
Pay all invoices	
Write a brief review for the website or an upcoming newsletter	

3. COSPONSORING

Some Clubs/SIGs cosponsor events with other organizations in their area, including Harvard-affiliated organizations (Business School Clubs, Law School Associations, Graduate School SIGs), as well as other Ivy League Clubs.

4. CORPORATE SPONSORSHIP

The HAA recommends that Harvard Clubs and SIGs exercise caution in deciding to work with corporate sponsors. General guidelines around corporate sponsorship are listed below. Specific questions concerning corporate sponsorship should be directed to the Harvard Trademark Program at trademark_program@harvard.edu.

1. The names of sponsors for specific activities may be listed in publications or other print materials. The listing should not be done in such a way as to suggest affiliation with or endorsement of the sponsor or its products or services by the University or its units.

2. No sponsor or third party may use the name or insignia of Harvard or any of its units without express written permission of the Harvard Trademark Program.

3. Disclaimer language (to the effect that Harvard does not endorse products or services) must appear somewhere on all websites that include corporate names, logos, etc. No advertising text or banner ads are allowed.

4. Express written permission must be given by the Harvard Trademark Program for the use of the name or shield of Harvard University or any of the Schools on any non-Harvard web page, or in any marketing or promotional materials for such a web page (this needs to be made clear to sponsors).

5. Additionally, the HAA SIG Policy outlines that the amount of the SIG sponsorship must not exceed the greater of (1) the expenses for the particular event, or (2) the SIG's annual operating expenses.

5. HARVARD CLUB AND SIG DISCLAIMER FOR SPEAKING EVENTS

Harvard Clubs offer an array of lectures and discussions that expose their members to diverse fields and viewpoints. The HAA believes the freedom of expression and debate during these lectures is helpful in building better and more respectful citizens. On some occasions Club and/or SIG program offerings might appear controversial to some members, therefore we would recommend that you include the following disclaimer on your event announcements:

"The views expressed during the event are solely those of the speaker and participating audience and do not imply endorsement by the Harvard Club of _____ and Harvard University".

6. HAA-SPONSORED EVENTS & PROGRAMS

ALUMNI LEADERSHIP CONFERENCE

Each year, the HAA sponsors a leadership conference tailored specifically to domestic and international Club/SIG officers. During two days of alumni-led workshops, panels, and meetings, Club/SIG delegates have the opportunity to exchange experiences with other Club/SIG leaders, discuss shared concerns and attempt to solve common problems. Every Club/SIG is strongly encouraged to send at least one officer or delegate to the conference each year.

The HAA also cosponsors an annual fall European Club Leaders Meeting in various cities throughout Europe.

HAA SPEAKERS BUREAU

Tap into the intellectual riches of the University through the HAA Speakers Bureau program, which provides U.S. Harvard Clubs and domestically based SIGs with the opportunity to host distinguished members of the Harvard faculty and administration.

U.S. Clubs/SIGs that meet the HAA's established standards to qualify for participation can request one faculty speaker per academic year. A Speakers Bureau event is often the most well-attended event of the Club/SIG's programming year.

The Clubs/SIGs and the HAA share the expense of this program. The HAA pays for the speaker's roundtrip transportation from Cambridge. Clubs/SIGs are responsible for the speaker's

meals and hotel accommodations. The participating faculty and administrators are volunteers, and we are very grateful to these individuals for their support of this HAA program.

An updated Speakers Bureau catalog is sent to Clubs/SIGs each July and is also available online at: http://www.clubsandsigs.harvard.edu/article.html?aid=116.

For international Clubs/SIGs, the HAA surveys faculty participating in the Speakers Bureau program regarding their international travel in an effort to connect them for speaker events. The HAA makes every effort to inform international Clubs of any faculty member traveling to their area.

To learn more, contact (800) 654-6494.

HARVARD PRIZE BOOK (CLUBS)

Introduce talented young people to the opportunities available at Harvard, and recognize their scholastic and personal achievements through the Harvard Prize Book program. Prize Books are presented annually in more than 1,900 high schools around the world to outstanding students in the next-to-graduating class who demonstrate excellence in scholarship and achievement in other nonacademic areas. The award is often given at the school's graduating exercises, with appropriate remarks by a local alumnus/a. The Prize Book may also be awarded to outstanding high school teachers who inspire curiosity and excellence in their students.

To establish a Prize Book award, a Harvard Club/SIG or Club/SIG member need only contribute the cost of one book. Participating Clubs and SIGs should contact the local high school principal and guidance counselor to introduce the program and to select the student to receive the award. Most Clubs and SIGs choose from titles offered by the HAA, including Harvard Observed, and The Harvard Book.

These books are available through The Coop at: www.thecoop.com/bookprize.

To learn more, contact (800) 654-6494.

SUMMER COMMUNITY SERVICE FELLOWSHIPS

Help students interested in working in the public interest, by funding a Summer Community Service Fellowship (SCSF). Through this program, Clubs and SIGs have the opportunity to provide a grant to a Harvard undergraduate working with a nonprofit host organization in their local community or area.

Participating Clubs and SIGs find the program to be an exciting and creative way both to support Harvard's students and contribute to their home communities. Club and SIG members particularly applaud the degree of "hands-on" engagement and interaction, as they review fellowship applications, speak with students about their experiences, and receive student reflection reports at the end of the summer.

The program is administered jointly by the HAA and the Center for Public Interest Careers (CPIC). It is recommended that participating Clubs and SIGs raise $3,500 per fellowship, which

is given to the student as a stipend to offset the income they would have earned, had they worked in a for-profit organization.

Established in 1992, the Summer Community Service Fellowship (SCSF) program has become a crucial initiative in supporting the development of a new generation of graduates working for the public interest. The program provides the largest source of funding for summer public service at Harvard College.

In November, the HAA contacts Clubs and SIGs with program information. To learn more, contact (800) 654-6494.

HARVARD-YALE FOOTBALL GAME TELECAST (CLUBS)
Cheer on Harvard Crimson as they meet Yale each November for The Game. Broadcast live to alumni around the U.S. alternately from Harvard Stadium and the Yale Bowl, alumni can view The Game in their home or at commercial establishments (bars, restaurants). The HAA does not charge Clubs for the telecast. A Club's only costs are those incurred at the event site on the day of The Game.

In September, the HAA contacts all U.S. and Canadian Clubs with broadcast information. Other international Clubs can request tapes of The Game in advance of the event. To learn more, contact (800) 654-6494.

HAA GLOBAL PASS (CLUBS)
Connect to the 190+ Harvard Clubs that exist in more than 70 countries around the globe through the HAA's Global Pass program. Members of participating Clubs can attend events held by any of the other participating Clubs, on a space-available basis, and pay the local member price for that event. This unique benefit gives alumni the opportunity to engage in one integrated, yet diverse, Harvard community. The program not only creates a way to encourage alumni to become more involved in their local Clubs, but it advances the University's and HAA's emphasis on the importance of globalization while fostering deep connections among alumni around the world. A list of participating Clubs is available at:
http://www.clubsandsigs.harvard.edu/article.html?aid=109

7. COMMUNITY-BASED PROGRAMS (CLUBS)

EARLY COLLEGE AWARENESS PROGRAM
Encourage middle school students and their parents to consider a plan for college through participation in the Early College Awareness (ECA) program. ECA targets families in less-advantaged communities who may not be aware of the options available to them, and strives to inform them about the college admissions process and the availability of financial aid. It is not specifically geared toward top students or toward applying to Harvard; it is an opportunity to serve the community by encouraging all young people to continue their education and fulfill their potential.

The purpose of the program is to provide hope as well as an important community service to students and their families; ECA gives assurance and a roadmap forward to those who don't think college is a possibility. Volunteers from a local SIG or Harvard Club will start by contacting a school's superintendent, principal, and/or guidance counselor for approval before

developing the program's content. Venue logistics are handled by SIG and Club volunteers, and the event is presented free of charge to the students and parents. More information about the program is available online at http://ecaprogram.wordpress.com.

To participate or to learn more, contact (800) 654-6494.

ADOPT-A-SCHOOL PROGRAM

Nurture educational potential through the HAA's Adopt-a-School program, which creates a direct link between a Harvard Club and a local public school. The Harvard Club of Chicago has had an Adopt-a-School program in the Chicago Public Schools system since the winter of 1989. The Club's current program is with Walter Payton College Prep. Over 200 Harvard volunteers referred to as "Harvols" (http://www.harvol.org) provide various kinds of assistance. There is a very active tutoring program covering all subjects.

College-counseling "buddies" advise students about appropriate colleges to apply to as well as how to complete the applications. Harvols also provide coaching for the debate, academic decathlon, and athletic teams, and assist with after-school activities such as the newspaper and physics and astronomy Clubs. For more information, contact the Harvard Club of Chicago via their website at: http://clubs.harvard.edu/university/hcchicago

"TEACHER OF THE YEAR" AWARD

Recognize an outstanding educational leader through the HAA's Teacher of the Year Award. A number of Clubs have introduced leaders in their local school systems to opportunities at the Harvard Graduate School of Education (www.gse.harvard.edu/~ppe). If your Club would like to honor a local "Teacher of the Year" in this way, here are two models to follow:

1) The Harvard Club of Long Island (HCLI) established a program to honor excellence in the more than 120 public school districts and private schools on Long Island. The HCLI asks current Harvard students to nominate the 7th- to 12th-grade teachers who made the greatest difference to their lives. A selection committee then chooses approximately one dozen nominees for "Distinguished Teacher Awards," which are given at an annual spring brunch. All nominees receive a letter of congratulations from the Club, copied to their superintendents. The Club then sends press releases to local papers regarding the dozen award winners and also invites the press to an award ceremony where two scholarship winners are named. As of 2007, two of the dozen nominees receive $1,000 scholarships to a Harvard Graduate School of Education seminar or weekend conference and are named "honorary fellows" of the Club. For more information, contact the HCLI via their website: www.harvardclubli.com

2) In Sarasota, the selection of Sarasota's "Teacher of the Year" is a joint effort of the county school system and the Sarasota Education Association. Each year the honoree becomes a candidate for Florida Teacher of the Year, who then competes to become National Teacher of the Year. Working to improve its support of the local program, the Harvard Club of Sarasota formed a Professional Development Committee to work with the Sarasota County Schools and the Harvard Graduate School of Education to provide professional development for teachers and administrators. The Harvard Club of Sarasota offers to facilitate (rather than fully fund) the winner's attendance at any of the HGSE summer institutes. For more information, contact the Harvard Club of Sarasota via their website: http://www.sarasotaharvardclub.org

7. SCHOLARSHIPS

If your Club/SIG is involved in scholarship fundraising, please be aware of the following:

1. U.S. Clubs/SIGs should register with their home state's Office of the Attorney General, Division of Public Charities, for authorization to solicit for donations. Fees for certification vary by state.

2. Clubs/SIGs providing financial assistance to Harvard students directly should report awards to the Financial Aid Office at (617) 495-5181. Any award or offer of financial assistance to a student that is not administered by Harvard's Financial Aid Office must be treated by Harvard the same as financial aid administered institutionally. Since Ivy institutions agree that financial aid is provided to students on the basis of need, this reporting procedure is required. Failure to do so jeopardizes Harvard's standing within the Ivy League and among the members of the National Collegiate Athletic Association (NCAA).

IV. COMMUNICATION

KNOW YOUR CONSTITUENCY (CLUBS)

Each August, the HAA provides all eligible Clubs with an alumni list that includes degree/year information as well as complete contact information for alumni in their area. Use this list to determine the number of alumni per School in your constituency. Create targeted events and communications to attract alumni groups you are not otherwise reaching. Good communication is the single most important element of a Club's effort to attract and sustain membership.

KNOW YOUR CONSTITUENCY (SIGS)

For those SIGs that do not utilize the HAA's offered suite of online tools, we annually provide an updated list of contact information for SIG members (the HAA requires SIG membership lists be submitted with a group's Annual Report). Good communication is also the single most important element of a SIG's effort to attract and sustain membership.

ELECTRONIC

1. WEBSITE

Over time, your Club/SIG website is the most valuable tool for communicating efficiently with members—and with nonmembers who visit the site to learn more about your Club/SIG. Be sure to keep the information current. A "stale" website can turn visitors off of the Club/SIG.

HAA WEBSITE TEMPLATE

The HAA continues to provide a website template. The template is a ready-made, easy-to-use template that can be customized for your Club/SIG. This is a great alternative for Clubs/SIGs without officers with web design or HTML expertise. The template allows Clubs/SIGs to construct a page by pointing, clicking, typing, or cutting and pasting the Club/SIG's information into standard sections such as Club/SIG Events, Membership, and Officers.

If you choose to design your own website, here are some suggestions for design & content:

- Homepage
  - Welcome; mission statement; Club/SIG contact information; HAA Global Pass member (Club)
- About the Club/SIG
  - Overview; constitution; officer profiles & contact information; committees
- News
  - Recent Club/SIG events or initiatives, S&S updates (Clubs), member news
- Events
  - Calendar of upcoming events; photos from past events
- Join the Club/SIG
  - Complete membership information
- Links
  - Harvard University: *www.harvard.edu*
  - Harvard Alumni Association: *http://alumni.harvard.edu*
  - Harvard News Office: *www.news.harvard.edu*

Copyright Information
If you include any content on your website that you did not create, including text, graphics, or sounds, you must determine if you have the right to use the material. This includes photographs and images downloaded from the HAA or Harvard University web pages. As with a newsletter, the Club/SIG will require written permission to use copyrighted material on its website.

2. EMAIL

Email is another excellent tool for communication—both with members and with nonmembers.

POST HARVARD EMAIL FORWARDING ADDRESS

All eligible Clubs/SIGs receive a complimentary Post Harvard email forwarding address to serve as their main point of contact. The standard format for an address is: Club/SIGname@post.harvard.edu. This address remains permanent while providing the ability to change the recipient's email address or to add multiple recipients. To request activation of your Club/SIG's Post Harvard address, to change the recipient, or to add additional recipients, please contact the HAA.

HAA CLUB ALUMNI LIST

Each August, the HAA provides all eligible Clubs with an alumni list that includes email information as part of the alumni contact information.

HAA SIG MEMBERSHIP LIST

Eligible SIGs are annually provided with an updated list of contact information for their members, including email addresses. In order to receive this, a group's membership list must be submitted with their Annual Report materials.

The HAA's Club broadcast email usage agreement is as follows: Clubs may send broadcast emails to alumni ONLY to promote Club membership and events; broadcast emails for purposes unrelated to specific Club-related activities is not permitted. Commercial, political, or other non-Harvard uses are not considered "Club purposes." When sending an email, copy your email list into the "bcc:" line only to protect the privacy of your Club members' addresses. The HAA recommends Clubs send only 3 broadcast emails per year to all alumni in their region. For members, the HAA recommends that Clubs create interest-based recipient lists so as not to overwhelm members with emails.

Tips for broadcast emails:

- Keep the body of your emails brief and upbeat.
- Be sure to indicate the "reply to." For example, let recipients know if they should reply to a particular officer who is collecting RSVPs or to the Club's Post Harvard address, etc.
- Always include the Club's website URL, if available .

HAA BROADCAST EMAIL PROGRAM

The HAA helps Clubs and SIGs leverage technology to communicate with alumni in their region by providing each Club/SIG with one broadcast email per academic year. Clubs/SIGs are encouraged to use the broadcast email program to advertise an event or solicit membership.

Guidelines for the broadcast email service are:

- The single Club/SIG broadcast email per year is in addition to any broadcast emails sent for HAA-sponsored events (e.g., Speakers Bureau program, Harvard Comes To…, and Presidential receptions);
- Request for your broadcast email should come 4 weeks prior to your preferred email date;
- Request should include: target audience (e.g., recent graduates) for Clubs or list of members for SIGs; preferred transmission date; email text (e.g., event invitation); contact information for replying to the email;
- The transmission date for your email will be determined in conjunction with requests already in the queue to alumni in that region;
- The HAA reserves the right to edit the text of your broadcast email communication; and
- In cases where the audience for a Club/SIG broadcast email overlaps with an HAA event, the HAA-sponsored event will take precedence.

3. HAA *eVENTS* INSERTION (CLUBS AND SIGS)

The HAA provides Clubs and SIGs the opportunity to reach out to the entire Harvard alumni community, a group encompassing over 300,000 members. A Club or SIG may submit a brief item to be included in the HAA e-newsletter *eVENTS*. Guidelines for inclusion are as follows:

- The program must be open to all alumni.
- The request for the copy to be included is due three weeks in advance of the scheduled sending (*eVENTS* is sent the first Tuesday of each month);
- The request should include:
    1. Organization name
    2. Volunteer name, phone and email
    3. Event Title
    4. Website URL (highlighting event and providing more information)
    5. Event date, time and location (address)
    6. Registration cost
    7. Registration requirement (URL or email address)
    8. Event description (50 words or less) – HAA reserves the right to edit content
    9. Contact information for more questions (e.g., SIG website, email address)
    10. Is the event location wheelchair accessible?

PRINT

1. MAIL

Clubs/SIGs have traditionally used mail, whether a newsletter, invitation, or "Save the Date" card, to generate interest in Club/SIG activities and to promote membership.

- Membership: at least once a year, the Club should send out a general membership mailing to all area alumni (for SIGs, their complete membership list), not just current or past members, with information about joining the Club/SIG. If you have a limited budget, and cannot mail to all area alumni, be strategic and focus the mailing on lapsed members.

- Timing: it is important and helpful to schedule annual mailings for the same time each year to create a sense of continuity.
- Author: the author of the piece plays a key role in attracting interest. Consider sending publications from the President, who can serve as the Club/SIG's spokesperson in all cases.

NONPROFIT BULK MAIL (FOR U.S. CLUBS & SIGS)

The term "bulk mail" refers to quantities of mail prepared for mailing at reduced postage rates. The nonprofit rate is available to nonprofit organizations for mailing pieces weighing less than 16 ounces. It is a domestic service only and is provided for an annual fee.

APPLICATION FOR NONPROFIT BULK MAIL RATE

To use the nonprofit bulk mail rate, Clubs and SIGs need to first obtain 501(c)(3) status from the IRS, and then apply for a permit through their local post office. Since you must apply for the permit at the post office you intend to use for all bulk mailings, we advise you to choose the main post office in the city most convenient for the Club/SIG's needs.

The application form, PS Form 3624, is available at *http://www.usps.com/forms/_pdf/ps3624.pdf* or at any post office. In addition to completing the application, your Club or SIG must submit supporting documentation. Specifics regarding this documentation can be found on PS Form 3624.

Your Club/SIG's application will be reviewed by the United States Postal Service in approximately two weeks' time. You can mail your Club/SIG's material while the application is pending, but you must pay postage at the regular (higher) Standard Mail rates until you receive nonprofit authorization. Once your nonprofit application is approved, you can request a refund of the difference between the regular and nonprofit rates.

PAYING POSTAGE

While the Postal Service offers three different ways to pay postage for bulk mailings, the most popular and convenient way is permit imprint.

Permit Imprint

Instead of using pre-canceled stamps or a postage meter, the mailer prints postage information in the upper right corner of the mail piece. This postage block is called an "indicia." To use permit imprint, you set up a postage account (called an "advance deposit account") at the post office where you'll be depositing your mail. When you bring your mailing to the post office, the total postage is deducted from your account. A mailing permit is required for this option. There is an accompanying $185 permit fee.

Application for Permit

To apply, Clubs and SIGs must:

- Submit PS Form 3615, Mailing Permit Application and Customer Profile, at your local post office. This form can be found at *http://www.usps.com/forms/_pdf/ps3615.pdf*;
- Pay the $185 application fee (this is a one-time only fee and pays for account set up);
- Make your first deposit into your permit imprint account; and

- Keep the permit imprint number and a receipt generated by the post office.

Specifics regarding the use of permit imprints can be found on the USPS website at *http://www.usps.com/send/postagepermitimprintsandmeters/tipsforusingapermitimprint.htm*.

Annual Mailing Fee
Regardless of the way you choose to pay postage for your bulk mailing, you must pay an annual mailing fee. This $185 fee is separate from any other application fees or account deposits. Payment gives you permission to mail a certain class of mail from a certain postal facility for 365 days. You cannot mail in bulk until you pay the annual mailing fee. For more information, visit *http://pe.usps.com/businessmail101/postage/annualMailingFee.htm.*

For complete information on nonprofit bulk mail, including preparation and depositing, visit your local post office or go to *http://www.usps.com/businessmail101/.*

2. CLUB & SIG NEWSLETTERS

Newsletters should be published on a regular schedule, which can be as frequently as monthly, but for most Clubs or SIGs is two to four times a year. You may choose to send the first newsletter of the year to all alumni, and subsequent issues only to Club or SIG members. Newsletters should be as "readable," interesting, and informative as possible about the Club/SIG's purposes and activities. It is helpful if Club and SIG members with experience in journalism, advertising, or public relations are willing to take responsibility for putting the newsletter together. The HAA has sample newsletters on file. Your Club or SIG newsletter can either be mailed or emailed in pdf format.

3. CLUB & SIG DIRECTORIES

A Club or SIG directory is a good way to keep alumni connected to each other. It can also be used as a membership-recruitment tool by making it available only to dues-paying members. Keep in mind that producing a directory may not be costly, but it does involve a considerable amount of work.

Directories may include member addresses, phone numbers, fax numbers, email addresses, School affiliation(s), class and degree information, and general information about the Club or SIG. A list of current officers, board members, past presidents, and committee chairpersons should be included. The Club/SIG's mission statement should be included; a brief history may also be useful. If possible, the Club or SIG directory should be published annually. This allows new Club and SIG members to be included soon after they join, and further provides a basis for membership renewal efforts.

When compiling a directory, it is essential to consider the privacy of your alumni. To safeguard this privacy, you should:

- Be clear on the directory survey that the information provided will be published and request written permission to publish it; and
- Include the following disclaimer in a prominent place in the directory: "The (year/Club/SIG name) Directory is not a public document and is made available only to dues-paying members of the (Club/SIG name). It is not to be given or sold to anyone else,

nor used for solicitations, political endeavors, or any commercial purpose; inappropriate use of this information may jeopardize the nonprofit status of the Club/SIG."

4. HAA Print Publications

Club & SIG Directory

This directory includes a list of HAA Regional Directors, U.S. and International Harvard Clubs and SIGs, Club and SIG Presidents, and their contact information. The Club & SIG Directory is now available at *http://www.clubsandsigs.harvard.edu* and can be downloaded at any time with the most up-to-date information.

Harvard Magazine

All alumni in the United Stated receive *Harvard Magazine* free-of-charge. The HAA provides a discounted subscription rate for all members of international Harvard Clubs.

HAA Club Officer Handbook: How to Start or Revive a Harvard Club

This handbook is intended to provide guidelines and resource information for starting or reviving a Harvard Club. This resource is available at:
http://www.clubsandsigs.harvard.edu/article.html?aid=105

HAA SIG Manual

This manual is intended to provide guidelines and information for alumni interested in establishing a SIG and to serve as a resource for currently existing SIGs. This resource is available at: http://www.clubsandsigs.harvard.edu/article.html?aid=114

V. SUPPORT

DIRECTORS FOR CLUBS AND SIGS

In addition to the HAA staff, HAA Directors for Clubs and SIGs are an excellent resource for Club and SIG officers owing to their knowledge and past experience with Clubs and SIGs. Each Club is assigned a Director based on geographic proximity. Each SIG is assigned a Director based on self selected categorization. Directors for Clubs and SIGs are volunteers who are appointed based on their depth of Harvard volunteer experience and knowledge and their willingness and ability to work with area alumni in furthering the HAA's mission. Directors serve three-year terms and may be reappointed by the HAA Executive Director.

Directors for Clubs and SIGs serve these organizations in the following capacities:

- **Advisor:** Club and SIG officers can look to their Director for advice on all matters concerning Clubs or SIG, including volunteer management, leadership development, types of activities, membership, bylaws and other statutory and organizational information, and finance.
- **Liaison:** Directors are in regular contact with the HAA and serve to facilitate communication between the HAA and Clubs and SIGs. Please include your Director on your mailing list and make an effort to communicate regularly with your Director.
- **Advocate:** Directors serve as advocates for alumni in numerous capacities and can speak to the HAA on a Club or SIG's behalf.

CLUBS AND SIGS COMMITTEE

The HAA Board of Directors, which meets three times a year in Cambridge (October, February, and April), has a standing Clubs and SIGs Committee composed of alumni volunteer representatives from both SIGs and domestic and international Clubs. The goals of the Clubs and SIGs Committee include: evaluating the effectiveness of Clubs and SIGs, considering and recommending methods by which the Clubs and SIGs can stimulate the maximum support and participation of alumni in Harvard affairs, and communicating and cooperating with other HAA standing committees on matters concerning Clubs and SIGs. The Committee also serves as a forum for Clubs and SIGs to discuss best practices, challenges, and opportunities for collaboration.