



HARVARD

Alumni Association

Organizational Info

HAA Clubs & Shared Interest Groups

Annual Report – Looking at FY24 (July 1, 2023 - June 30, 2024)

As we approach the end of the Spring semester, it's time to complete the HAA Clubs and SIGs Annual Report survey. We've enhanced and streamlined the survey based on your feedback, making your participation even more valuable. Your contributions will be critical in crafting the comprehensive Annual Report book, slated for release in Fall 2024.

The survey will close on Sunday, May 19, 2024, at 11:59 p.m. ET. Here's how to proceed:

Step 1: Review and Gather Data

Use the provided checklist to collect necessary information and preview survey questions.

Step 2: Designate a Survey Representative

Identify an individual within your organization to complete the survey, which should take about 20 minutes.

Step 3: Submit Survey Responses

Promptly submit your responses and save a PDF copy for reference.

Additional Notes:

- Only ONE Annual Report submission is required per Club or SIG.
- If the President isn't the submitter, kindly forward the PDF to him/her.
- For inquiries, contact your dedicated [Staff Liaison](#).

Completion of the Annual Report is required. Please ensure submission by the deadline to maintain good standing with the University. We appreciate your partnership and eagerly anticipate your valuable contributions.

Name of person completing this Annual Report Survey:

Email of person completing this Annual Report Survey:

Role of person completing this Annual Report Survey:

- ☐ President
- ☐ Vice President
- ☐ Secretary
- ☐ Treasurer
- ☐ Paid Staff
- ☐ Other

Our organization is a:

- ☐ Club
- ☐ Shared Interest Group (SIG)

Club Name:

Select

SIG Name:

Select

Does your SIG have active chapters?

☐ Yes ☐ No

Provide a list of active SIG chapters:

Does your SIG have guidelines or governance documents for SIG chapters?

☐ Yes ☐ No

Org Operations

Organizational Structure & Leadership

What is the organization's current nonprofit status?

- ☐ 501(c)3 - Charitable organization
- ☐ 501(c)4 - Social Welfare
- ☐ 501(c)6 - Business League
- ☐ 501(c)7 - Social Club
- ☐ International nonprofit
- ☐ Undeclared

☐ Don't know

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

☐ January 1

☐ July 1

☐ September 1

☐ Other (please specify)

Share the timing for these processes for the organization:

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

When do elections occur?

When do new officers start?

What is the organization's presidential structure?

☐ President only

☐ Co-presidents that start/end together

☐ Co-presidents with staggered terms

What is the presidential term length?

☐ 1 year

☐ 2 years

☐ 3 years

☐ Other

President information:

Name

Degree and Year

Email

Start Date (MM/DD/YYYY)

Co-president (1) information:

Name

Degree and Year

Email

Start Date (MM/DD/YYYY)

Co-president (2) information:

Name

Degree and year

Email

Start Date (MM/DD/YYYY)

Select the range that best reflects the number of volunteers that have been actively involved in your operations in the past 12 months?

- ☐ 1-5 active volunteers
 - ☐ 6-10 active volunteers
 - ☐ 11-20 active volunteers
 - ☐ 21-30 active volunteers
 - ☐ 31-50 active volunteers
 - ☐ 51+ active volunteers
-

Who does your organization communicate with?

	Yes	No
HAA Staff Liaison	<input type="radio"/>	<input type="radio"/>
HAA Board Appointed Director for Clubs and SIGs	<input type="radio"/>	<input type="radio"/>

What is the name of your HAA Staff Liaison?

- ☐ Sara Aske
 - ☐ Dia Combas
 - ☐ Kim Delehanty
 - ☐ Rachel Tsavalakoglou
 - ☐ unsure
-

Bylaws & Governance

Bylaws & Governance

The status of the organization's bylaws is:

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

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

- ☐ Yes
 - ☐ No
-

Please upload a copy of the organization's new bylaws

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

☐ Yes ☐ No

Please describe the OTHER governance documents used to support organization operations (e.g. role descriptions, board manual)?

Operations - Financials

Operations - Financial & Insurance

Does the organization have an active bank account?

☐ Yes
☐ No

Did the organization file a 2022 or 2023 tax return?

☐ Yes
☐ No
☐ Not yet
☐ Not applicable
☐ Unsure

Did the organization generate revenue in 2023?

☐ Yes

☐ No

How are organization REVENUES earned?

To the best of your knowledge, please enter a whole number, adding up to 100%. For rows that do not apply, leave as 0.

Membership fees

0

Events

0

Sponsorships (Corporate or individual donations to underwrite specific events or programs)

0

Donations (Monetary gifts NOT in the form of dues or sponsorships)

0

Other

0

Total

0

Did the organization have expenses in 2023?

☐ Yes

☐ No

How are organization funds SPENT?

To the best of your knowledge, please enter a whole number, adding up to 100%. For rows that do not apply, leave as 0.

Events and programs

0

Charitable endeavors	0
Staff salary and/or benefits	0
General expenses	0
Other	0
Total	0

Which type(s) of insurance does the organization have?

Check all that apply

- ☐ General Liability
- ☐ Directors & Officers (D&O)
- ☐ Neither

Events and Programs

Events & Programming

For the remaining sections, please do your best to answer for fiscal year 2024 (July 1, 2023 - June 30, 2024)

Provide the number of events held / to be held from July 1, 2023 - June 30, 2024?

Please enter as a whole number with no commas or symbols

How frequently does the organization offer events?

- ☐ Several times a week
- ☐ Weekly
- ☐ About twice a month

- ☐ Monthly
 - ☐ Bi-Monthly
 - ☐ Quarterly
 - ☐ Infrequently
 - ☐ None in the past 18 months
-

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

- ☐ Alumni speakers
 - ☐ Annual event
 - ☐ Allyship
 - ☐ Book discussion groups
 - ☐ Cultural programming
 - ☐ Early college awareness
 - ☐ Faculty speakers
 - ☐ Family-friendly events
 - ☐ Interactive workshops
 - ☐ Local community/volunteer service
 - ☐ Moderated/panel discussions
 - ☐ Networking/social gatherings
 - ☐ Non-Harvard speakers
 - ☐ Outdoor social outings
 - ☐ Other
-

The organization has participated — or will participate — in the following HAA-enabled programs between July 1, 2023 and June 30, 2024.

	Yes	No
Alumni Day (viewing party or local event)	<input type="radio"/>	<input type="radio"/>
Global Networking Night	<input type="radio"/>	<input type="radio"/>
Harvard Moves	<input type="radio"/>	<input type="radio"/>

	Yes	No
Harvard Prize Book	<input type="radio"/>	<input type="radio"/>
SIG Meetups (on campus during Reunions)	<input type="radio"/>	<input type="radio"/>
Speakers Bureau	<input type="radio"/>	<input type="radio"/>
Summer Community Fellowship Program	<input type="radio"/>	<input type="radio"/>
Sponsor Scholarship (degree-seeking student)	<input type="radio"/>	<input type="radio"/>
Sponsor Scholarship (local leader takes a course)	<input type="radio"/>	<input type="radio"/>
The Game: Harvard-Yale Viewing Party or Tailgate	<input type="radio"/>	<input type="radio"/>
Welcome to Your City	<input type="radio"/>	<input type="radio"/>

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

- ☐ Organization website
- ☐ Organization newsletter
- ☐ Targeted email to promote a specific event
- ☐ Harvard This Week newsletter
- ☐ Text or group messaging
- ☐ Social media
- ☐ Local community collaboration
- ☐ Mailings of printed material

What partners has your organization collaborated with since July 1, 2023?
(Check all that apply)

- ☐ Harvard Club
- ☐ Harvard SIG
- ☐ Alumni Association of Harvard Professional Schools (e.g. HBS, HLS, HKS)
- ☐ Other Harvard department, office or center
- ☐ Harvard student group
- ☐ Other Ivy alumni organizations
- ☐ Other

☐ None

Communications - General

Communications

How does the organization engage with members?

- ☐ Email newsletter
 - ☐ Social Media
 - ☐ Group Messaging
 - ☐ Phone calls
 - ☐ Snail (paper) mail
 - ☐ None of the above
-

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

- ☐ Newsletter
 - ☐ Event promotion
 - ☐ Post-event highlights
 - ☐ Membership campaigns
 - ☐ Volunteer opportunities/recruitment
 - ☐ Leadership elections
 - ☐ Other
-

How often does the organization send newsletters/general outreach?

- ☐ Weekly
- ☐ Bi-weekly

- ☐ Monthly
 - ☐ Bi-monthly
 - ☐ Quarterly
 - ☐ Bi-annually
 - ☐ Annually
-

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

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

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

Membership

Membership

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

- ☐ No membership (e.g. all alumni in database are considered "members")
 - ☐ Free membership (e.g. all alumni in database are invited to opt-in and those who opt-in are considered members)
 - ☐ Paid membership
 - ☐ Mix of free and paid membership
-

What are the organization's membership numbers?

Total number (#) of paid members

Total number (#) free members

Please indicate which memberships are free or discounted

	Free	Discounted
New alumni (0-1 year out)	<input type="checkbox"/>	<input type="checkbox"/>
Recent alumni (between 1 to 5 years out)	<input type="checkbox"/>	<input type="checkbox"/>
Current students	<input type="checkbox"/>	<input type="checkbox"/>

How does the organization collect membership?

- ☐ Rolling cycle (i.e. begins on the day of purchase)
 - ☐ Set cycle (i.e. tied to calendar or fiscal year, beginning or end of month)
-

Optional

Optional: Organization Success Stories and Challenges

The following two text-based questions are optional.

Share a success story of how your Club or SIG has positively impacted a local community.

What are some of the biggest challenges for your Club or SIG?

Signatures

I attest that the information provided is accurate to the best of my ability.



SIGN HERE

clear

My name:

My role or title:

We want to express our gratitude for taking the time to complete the Annual Report Survey. Your responses inform the insights in the Annual Report book and raise the profile of Clubs and Shared Interest Groups (SIGs) worldwide.

Additionally, we encourage you to save your responses as a PDF on the next screen for easy reference and documentation.

Please remember to update any changes in your organization's leadership using the [Volunteer Leadership Form](#), conveniently located in the Officers Lounge under the "Directories" heading.

Thank you for your steadfast leadership and ongoing partnership.