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HAA SIG ROADMAP

GUIDEBOOK FOR SIGS

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SIG ROADMAP

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I. INTRODUCTION

The purpose of this document is to provide a practical guidebook for SIGs with strategies to navigate the various challenges that come with setting up, growing, and maintaining a SIG. The approach is practice-based (not theory) incorporating SIG Directors' understanding of all the complexities and nuances of setting up and running a SIG. As such, the SIG Roadmap includes best practices, tips, and insights from different experiences of past and current Directors.

Understanding that each SIG is unique and there's no one-size-fits-all approach, the SIG Roadmap endeavors to incorporate guidance for start-up, emerging, growing, and established SIGs. This document allows leaders to reflect on various areas of SIG management based on best practices. The SIG Roadmap has three main parts: a self-assessment, priorities by stage of development, and key definitions and best practices.

The SIG Self-Assessment looks at 11 areas of activities and practices that all SIGs encounter. By asking SIGs to identify where they are in implementing these practices, this document helps them identify their strengths and priority areas for improvement. They can then use that information to develop a plan for addressing gaps, seek out resources and support, and monitor and evaluate their ongoing progress.

The Priorities by Stage section outlines the three stages of organizational development (start-up, growth, mature) that SIGs go through. This document identifies the key priorities that SIGs should focus on at each stage of development, allowing leaders to direct their current efforts to strengthening specific areas, while looking ahead to future capacities that they will need to build. Note that while there are years associated with stages of development, these are meant as guidelines. It is common for SIGs to cycle through these various stages throughout their time as established organizations. For example, long-established SIGs may be in a rebuilding phase and Start-Up Stage priorities may be more appropriate.

The Key Concepts section provides SIGs with definitions and best practices related to the various areas identified in both the Self-Assessment and Priorities by Stage sections. This document serves as a reference for SIGs, defining terms, describing practices, and offering helpful resources.

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II. SIG SELF-ASSESSMENT

Read each practice, then select the option that best reflects the state of that practice at your SIG:

1: We do not do this. | 2: We do this, but not sure how well. | 3: We excel at this.

	1	2	3	N/A
Governance				
Our board oversees and ensures accountability for strategic and financial forward planning.				
Our board uses clearly assessed needs, job descriptions, and performance evaluations in board recruitment and retention strategies.				
Our board has active committees that meet regularly and have tasks on which they report to the full board.				
Our board members participate fully and give of their time, skills, and connections.				
Our board has a succession plan, strategies for growing membership, and holds regular elections.				
Our bylaws include election protocols.				
Planning and Evaluation				
We have a clear mission, vision, and articulated values which drive planning strategies and programmatic and operational activities.				
We measure, evaluate, and monitor progress towards achieving our mission based on established goals.				
We clearly communicate about our work in terms of the impact we achieve.				
We set strategy through periodic needs assessments that include all stakeholders.				
Financial Management				
We develop an annual budget that is regularly reviewed by the board and make adjustments, as necessary.				
We budget towards cash reserves and have a reserve oversight policy.				
We have sound financial management systems, including checks and balances.				
Communications				
We have a current communications/marketing plan with clear tactics and measurable goals.				
Our brand and style are consistently used in all marketing and messaging.				
We evaluate and determine which communications vehicles best drive our communication goals.				

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Events				
We have an annual calendar of events that engage members throughout the year.				
We utilize volunteers regularly to assist with events.				
We develop and monitor the budget for events.				
Membership				
We conduct membership recruitment activities every year.				
We have articulated the value of membership and use it to guide our programs and activities.				
We protect the privacy and integrity of our membership lists.				
We solicit regular feedback from our members to gain insight on their evolving needs.				
We actively recruit volunteers to engage our membership, support programming and develop leadership.				
Partnerships and Collaborations				
We participate in strategic partnerships with other SIGs, clubs, and other entities, to achieve our goals.				
Culture and Community | Community Expectations and Guidelines & Alumni Affairs & Development and HAA Inclusion Guidelines				
Our board is diverse and reflects the communities we serve.				
We regularly assess the state of culture and community among the board, our membership, our partnerships, and other stakeholders, and set authentic measurable results.				
We have articulated a vision for how culture and community forward our mission.				
We regularly work to improve our cultural competence relating to our various communities.				
Fundraising and Resource Development				
We have a development plan and fundraising calendar that are monitored regularly.				
We track donations and other income.				
We seek multiple income streams, given our size, organizational structure, and aspirations.				
We cultivate donor relationships year-round.				
Technology				
We use reliable technology systems to advance the mission, track data, and increase efficiency.				
Chapters				
We have active chapters that engage members regularly.				
Our chapters operate within the remit of the Board.				
We have strong chapter leaders and regularly engage, support, and provide them with proper oversight.				

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III. PRIORITIES BY STAGE

Tips:

- Each stage has an incubation period to determine viability and sustainability.
- SIG should meet HAA's minimum requirements to ensure long-term sustainability.
- Indicated years are meant as guidelines. For example, long-established SIGs may be in a rebuilding phase and Start-Up Stage. priorities may be more appropriate.

START UP STAGE (Years 1-5)			
Definition:	New SIG or existing SIG that is being rebuilt.		
Key Priorities	**Phase 1**	**Phase 2**	**Phase 3**
Operating Agreement:	Agreement understood and endorsed by founding board.	Review and sign agreement annually.	Review and sign agreement annually; endorsed by President(s) and Treasurer.
Leadership & Bylaws:	Identify and recruit founding board members and outline bylaws.	Formalize bylaws, recruit initial board members and appoint a minimum of three officers (President, Secretary, and Treasurer).	Review and maintain bylaws annually ensuring adherence to the outlined operating procedures.
Financial Management:	Outline initial budget and identify potential funding sources.	Implement basic financial controls and establish a basic funding model (i.e. membership dues, donations, and/or sponsorships).	Ensure consistent financial controls and execution of agreed upon funding model.
Communications:	Define key messages and establish basic communication tools (e.g., email, social media accounts).	Develop a communications plan with objectives and strategies.	Maintain consistent online presence including contact phone/email and provide regular communications (social/email).
Event Hosting:	Plan initial event concept and logistics.	Execute first small-scale event.	Consistently promote at least three events annually, which can include Club/SIG co-sponsored events and HAA-enabled events.

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GROWTH STAGE (Years 6-10)			
Definition:	SIGs that have successfully delivered Start-Up requirements and are in good-standing with the HAA.		
Key Elements	**Phase 1**	**Phase 2**	**Phase 3**
Membership Expansion:	Analyze current or desired membership base and identify target areas for growth.	Implement membership drive initiatives i.e. email campaigns, events, & social media.	Evaluate and refine membership strategies based on feedback and growth metrics.
Volunteer Recruitment:	Identify roles needed and outline volunteer job descriptions.	Recruit volunteers for key positions and establish initial committees.	Attract volunteers and establish committees to manage the increased scale of activities and membership.
Event Diversification:	Gather member feedback on event preferences and needs.	Plan a variety of new event types based on feedback.	Expand and diversify events and programs to meet the evolving interests and needs of the membership base.
Strategic Partnerships:	Identify potential partners and outline benefits of collaboration.	Formalize a few strategic partnerships and collaborate on initial projects.	Sustain and expand partnerships with other SIGs to increase resources and opportunities available to members.
Brand Building & Marketing:	Define brand identity, key marketing messages, and specific KPIs to track.	Implement initial marketing campaigns and track performance to iterate on messaging, channels and/or tactics.	Consistently track and report on marketing KPIs and enhance its visibility through effective marketing.

MATURE STAGE (Years 11+)			
Definition:	SIG that has been in good standing 2+ years consecutively.		
Key Elements	**Phase 1**	**Phase 2**	**Phase 3**
Leadership Succession Planning:	Identify potential leadership candidates and initiate mentoring.	Develop and implement formal succession planning processes.	Ensure succession planning is prioritized continuously and built into ongoing leadership discussions.
Sustainability & Financial Health:	Review financial health and identify areas for improvement.	Develop strategies for financial diversification.	Ensure long-term financial stability through diversified funding streams, and prudent financial management.

Innovation & Relevance:	Assess current programming for areas needing innovation.	Pilot new programs or initiatives and report measurable outcomes to the board.	Continuously innovate programming and content to remain relevant to members.
Member Engagement & Retention:	Develop initial member engagement surveys.	Implement targeted strategies based on survey results.	Implement advanced strategies for member engagement and retention, including surveys, recognizing member contributions, providing value-added services, and facilitating networking opportunities.
Impact Assessment and Strategic Review:	Establish metrics for assessing impact.	Conduct initial reviews and adjust strategies as necessary.	Regularly assess the impact of the group's activities and conduct strategic reviews to align operations with the group's long-term vision and mission.

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IV. SIG Roadmap Overview

SIG ROADMAP OVERVIEW

This a tool for SIG leaders to assess their current practices, identify areas for improvement, and implement best practices based on their unique needs

Key Priorities by Stage

Start-up Stage (Years 1-5)

Operating Agreement
Create and annually review the agreement with board members

Leadership & Bylaws
Recruit key officers (President, Secretary, Treasurer) and formalize bylaws

Financial Management
Set an initial budget and establish basic funding (e.g., dues, donations)

Communications
Set up email and social media, maintain regular communication

Events
Host at least three events annually to engage members

Growth Stage (Years 6-10)

Membership Expansion
Launch campaigns and events to grow membership

Volunteer Recruitment
Establish committees and recruit volunteers for key roles

Diversify Events
Gather feedback to plan new event formats

Partnerships
Form collaborations with other SIGs or external groups

Marketing
Strengthen brand identity, run marketing campaigns, and track performance

Mature Stage (Years 11+)

Succession Planning
Mentor future leaders and implement formal succession processes

Financial Sustainability
Ensure long-term financial health through diversified income

Program Innovation
Continuously innovate and pilot new initiatives

Member Engagement
Focus on retention through surveys, recognition, and value-added services

Impact Assessment
Regularly review the group's activities and align with long-term goals

V. Key Concepts: Definitions & Best Practices

Governance

- **Leadership Roles**
  - Officer roles such as board president, treasurer and secretary are defined in the Bylaws and should clearly describe roles and responsibilities such as meeting minute taking, financial reporting, and HAA annual report compilation.
- **Board Compensation**
  - Board members generally serve voluntarily, but there may be cases where they are compensated for professional services beyond their board duties. Such compensation must be carefully documented in the Bylaws, transparently disclosed, and approved by the board to prevent conflicts of interest. It should reflect the market value of the services and not affect the board member's impartiality. Annually, all board members should review and sign a conflict of interest policy that outlines procedures for managing potential conflicts arising from compensation, ensuring adherence to ethical standards and governance practices.
- **Succession Planning (recruitment and retention)**
  - Bylaws often describe standing committees such as Governance or Nominating, which focus on ensuring continuity in leadership by tracking term service and creating a skills grid for the Executive Committee.
  - In some cases, the succession planning effort may include an annual board self-evaluation and/or a director's personal evaluation of attendance, active meeting participation, and patterns in job completion.
  - Plan ahead and use tips available here: Leadership & Succession Planning Best Practices.
- **Ambassadors/Chapters**
  - Ambassador and Chapter groups offer SIG geographic diversity as well as a pipeline for future leadership and engagement.
  - Before starting an Ambassador/Chapter structure, ensure your SIG has the foundational elements in place. Additionally, the following elements are recommended:
    - It is critical that volunteers are identified who are willing to become Ambassador/Chapter leaders in those geographies.
      - Ideally the Ambassador/Chapter leaders should be current/past members of the SIG Board.
    - Ensure there is regular oversight and engagement by the Board with a Board member assigned to liaise with Ambassadors/Chapters.

        - Schedule regular meetings with the global Ambassador/Chapter leaders so they can coordinate with the Board and learn from each other.
    - Inform the HAA Clubs and SIGs team of new Ambassador/Chapter formation.
- **Bylaws**
    - Critical to have and maintain/update/review; include items such as community guidelines, data privacy, term limits, etc.
    - Board Secretary, with the Governance Committee or Executive Committee, should establish a meeting in the board meeting cadence dedicated to Governance and self-reflection on whether the SIG is following their own Bylaws.
- **Compliance**
    - At minimum good governance is defined by following your Bylaws and adhering to the practice of regular meetings and HAA rules of conduct per the HAA Operating Agreement. For larger 501(c)(3) SIGs, adhering to annual filing dates with the State Attorney General and or other financial reporting should be monitored by the SIG officers to avoid fines or other costly delays.
- **Governance Calendar**
    - Referencing the Bylaws, consider creating a fiscal year calendar noting the annual meeting, board meeting cadence and HAA annual report due date. To ensure participation from SIG leadership, distribute the annual calendar with video conference links the Summer before the board calendar launches. As part of the board meeting calendar, the SIG may consider themed agendas over their fiscal year including four quarterly meetings such as: Q1 Strategic Planning/Programmatic Goals; Q2 Fundraising/Development; Q3 Engagement; and Q4 Governance and Succession.

EVENTS

- **Sample Calendar**
    - Develop an annual events calendar that strategically distributes events throughout the year to maintain engagement and maximize participation. Include both large-scale and smaller, more frequent events to cater to diverse member interests and availability.
- **Annual Event**
    - Plan a flagship annual event that highlights the year's achievements, celebrates milestones, and fosters community spirit. Ensure this event includes elements that appeal to a broad section of the membership, such as keynote speeches, networking opportunities, and awards ceremonies.

- **Sample Invite**
  - Create a template for event invitations that can be customized for different occasions. The template should include essential details (date, time, venue, purpose of the event) and a clear call to action. Utilize engaging and inclusive language that reflects the spirit of the SIG.
- **Tips and Tricks**
  - **Scalability**: Design events that are scalable, allowing for adjustments based on varying levels of participation and resource availability.
  - **Realistic Planning**: Set realistic goals for attendance and engagement based on past events and current member interest levels.
  - **Feedback Mechanisms**: Incorporate mechanisms for collecting feedback during and after events to improve future planning and execution.
  - **Diverse Formats**: Mix traditional formats with innovative ones like webinars, workshops, and interactive panels to keep the events dynamic and accessible to wider audiences.
- **Developing an Event Planning Template**
  - Create a comprehensive template that outlines all the necessary steps for event planning, from initial concept to post-event follow-up. This should include budgeting, scheduling, resource allocation, marketing, and evaluation phases.
  - You can find an event budgeting template and additional tips on the Event Marketing Toolkit.
- **Developing an Event Timeline**
  - Establish a clear timeline for each event that details every critical milestone, from the planning phase to the execution. This timeline should include deadlines for venue booking, invitations, confirmations, and setup.
  - You can find an event timeline on the Event Marketing Toolkit.
- **Speakers, Sponsors, and Collaborations**
  - Identify and secure speakers who can add significant value to the events. Approach potential sponsors who align with the SIG's values and objectives for financial or in-kind support. Foster collaborations with other organizations to broaden the event's impact and reach.
  - You can find sponsorship tips on the Sponsorship Best Practices resource, and partnership and collaboration tips here.
- **Relevant Contracts**
  - Ensure all agreements with speakers, sponsors, and collaborators are formalized through contracts that specify each party's roles, responsibilities, and benefits. This will help manage expectations and reduce potential conflicts.

COMMUNITY RESOURCES

- **Knowledge-sharing**
  - SIGs have various tools at their disposal for facilitating knowledge-sharing among alumni.
    - SIGs often organize events, both in person and virtual, highlighting one or more alumni, giving them a platform to reach members. Examples include readings associated with book launches, expert panels on topics of current interest, film screenings, etc.
    - Some SIGs organize special on-campus summits that bring their members together. These conferences not only connect members but also allow for exploration of multiple topics and themes. These are large undertakings and require an enormous amount of planning and resources.
    - SIGs can also use the communications tools at their disposal for knowledge-sharing. E-mail, newsletters, and social media can be used to disseminate information and spur further interest and dialog.
- **Advising/Mentorship Program**
  - SIGs have the opportunity to connect members either to each other or to current students in an advising or mentoring capacity. Some SIGs have formal mentorship programs facilitated by board members or other volunteers. These leaders would oversee recruitment and pairings and troubleshoot any issues that may come up. Connecting with current students can be done through partnerships with on-campus groups as well as through the Mignone Center for Career Success (MCS). MCS Firsthand Advisors is an online platform that connects alumni with students seeking "flash mentoring" that can include career chats, resume reviews, or practice interviews, among others. View additional opportunities to engage and support students.
- **Job boards**
  - Alumni often find SIGs to be a great place for career networking. SIGs can facilitate the distribution of opportunities to its members using various communications tools including e-mail, listservs, social media, Slack, WhatsApp, etc.

General Best Practices

Membership Models

- Below are Membership Models which can be adapted/combined to suit SIG goals and needs; remember to consider the value proposition:

Model	Benefits	Challenges
Free: Emphasizes engagement over revenue.	Newsletters, event invitations, online resources and networking.	Limited funds for events, programs, and services.
Paid: Alumni pay an annual or lifetime fee for membership with various levels offering different benefits.	Membership fees fund events, scholarships, and initiatives; paid members get exclusive perks like discounts and special event access.	Higher costs may reduce participation and raise expectations for value.
Tiered: Multiple membership tiers offer varying benefits; basic tier may be free, while higher tiers require payment.	Flexibility for alumni and ability to cater to different segments.	Managing and communicating different tiers effectively can be complex.
Donor-Based: Levels tied to donation amounts.	Promotes philanthropy and creates a direct link between giving and engagement with potential recognition and perks for donors.	May alienate alumni who cannot afford to donate or choose not to donate.
Event-Based: Based on participation in specific events or activities, e.g., attending a set number per year.	Encourages engagement and fosters community through shared experiences.	Alumni who are unable to attend events regularly may feel excluded.
Hybrid: Offers free basic membership with paid options for premium content or events.	Flexibility for diverse needs, balancing engagement and revenue.	Requires careful planning to avoid confusion among components.

Communications Guide

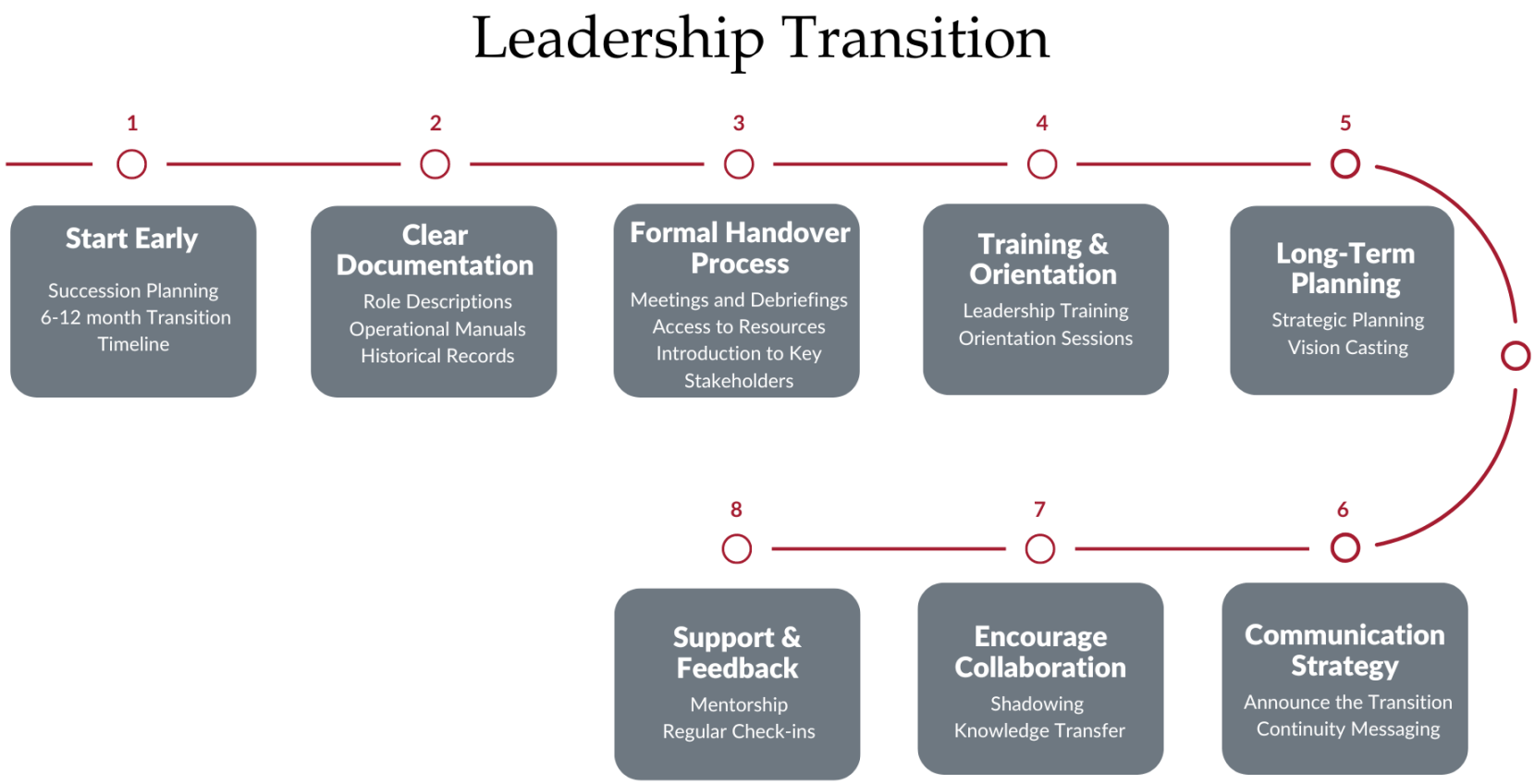
- A communications guide for SIGs ensures consistent, effective engagement, helping leaders and members connect with alumni, promote events, and foster belonging.
- Consider the following:

Public Relations Protocols

- Public relations (PR) protocols are essential for maintaining a strong, engaged, and positive relationship with alumni members, as well as the broader community, and the university. These protocols can help manage communication, promote activities, and ensure consistency in messaging.
- It is rare that a SIG would publicly comment, but in such situations, hiring a public relations (PR) firm can be a smart strategy for enhancing communication efforts, improving visibility, and creating professional, well-crafted campaigns. However, the process requires careful planning and consideration to ensure the partnership is a good fit for the SIG's goals, values, and budget and aligned with HAA guidelines.
- When vetting potential PR firms, confirm their experience working with alumni entities in a manner that upholds the mission of the SIG as well as the university.
- PR firms can add value through their media contacts, creativity, and strategic insights, but careful planning and ongoing communication are critical to ensure a successful collaboration that benefits your SIG and strengthens bonds with the community.

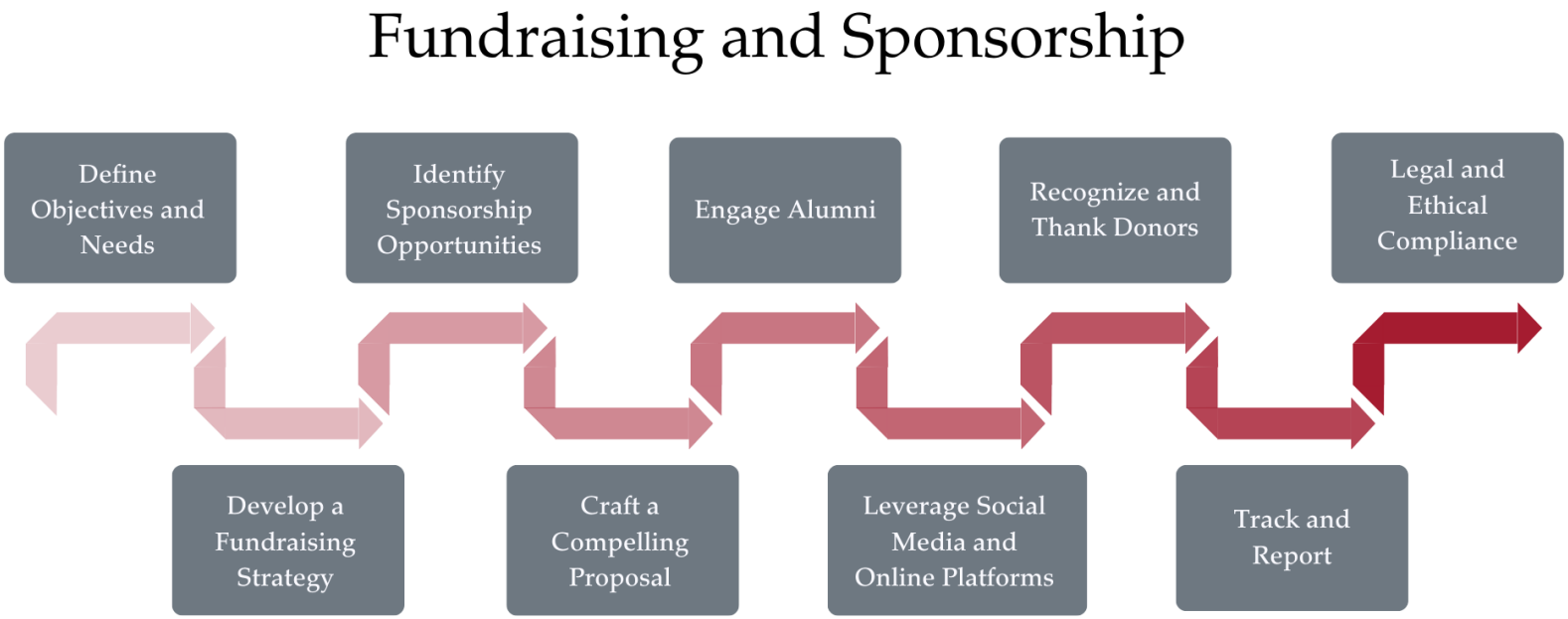
Leadership Transition

- Here are some best practices to consider:



Fundraising and Sponsorship (monetary and in-kind)

- Fundraising and sponsorships are crucial for supporting SIG events, scholarships, and initiatives. A structured approach will help your SIG effectively raise funds and secure sponsorships for its initiatives. Here's a guide to navigate this process:



Tax Exemption

- While not necessary, many SIGs apply for tax-exempt status because:
  - It exempts them from paying taxes.
  - It can make fundraising easier.
- Most seek 501(c)(3) status (but there are 27 different types and depends on the purposes and activities of the organization).501(c)(3) status.
  - This is the most common tax-exempt status, because contributions are tax-deductible.
  - Organizations must be organized and exclusively for charitable, religious, educational, scientific, literary, testing for public safety, fostering national or international sports competition, and preventing cruelty to children and animals.
- 501(c)(4) organizations as an alternative.
  - Organizations must be operated exclusively for the promotion of social welfare (promoting common good & welfare of the community).
  - Social Welfare organizations: Their purpose may be the same as a 501(c)(3) organization, but permissible methods of achieving those purposes are different.
  - Drawback: Contributions are not tax deductible and can make fundraising more difficult.
- SIGS are responsible for abiding by tax rules and ensuring any tax-exempt status they seek meets IRS criteria or the international equivalent.
- Regardless of any government-approved activities of the organization, per the HAA Operating Agreement:
  - The SIG will remain neutral on all political issues both inside and outside the Harvard community.
  - The SIG may not engage in any political campaign or make statements for or against any candidate for public office.

Treasurer Guide and Compliance

- General accounting tool:
  - QuickBooks online is very affordable at $75/year via TechSoup for nonprofits.
- Reporting practices.
  - Monthly Reports:
    - Balance sheet.
    - YTD income statement.
    - YTD cashflow reports.
    - Donations received from all donors.
- Taxes.
  - Clubs and SIG with less than $50k of annual revenues can file a 990-N postcard with IRS instead of a complex series of tax forms.
- Bank Account.
  - Small business bank accounts can be opened by a non-profit SIG at any US banking institution.
    - Access should be limited to President, Vice President, and Treasurer.
  - If the SIG gets a corporate credit card, cards should just be issued to the President, Vice President, and Treasurer.
- Platform to receive funds like membership dues, event tickets, donations, etc.
  - With a large enough bank (PNC, Chase, Bank of America, Citibank), any club or SIG should be able to set up Zelle directly via their online portals.
    - Zelle is free of charge to use.
    - Credit card payments via Stripe incur a 3.5% fee.\
    - PayPal Giving Fund has a 0% fee, but they hold onto funds for 30+ days as float.
    - Checks can be mailed to the registered address (and then forwarded to the Treasurer for online deposit).

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Phases of SIG Leadership Work Allocation, Resource Planning, and Collaboration Opportunities

Phase	Key Leadership Focus	Delegation Opportunities	Collaboration Opportunities	Strategic Planning Actions
1. Startup Phase	**Leadership Focus:** ● Develop vision, mission, and priorities for the SIG. ● Lead all alumni engagement, leveraging personal connections and networks to build community. ● Take charge of high-impact work, such as fundraising, outreach, and event leadership. ● Represent the SIG in university interactions and advocate for resources.	**Delegation Opportunities:** ● Recruit students to handle administrative tasks, e.g., stuffing envelopes, maintaining contact lists. Engage volunteers for event logistics, such as registration or setup. ● Assign a volunteer to draft basic communications or manage social media posts under board guidance.	**Collaboration Opportunities:** ● Partner with local Harvard Clubs to co-host events, reducing costs and sharing volunteer resources. ● Collaborate with nearby SIGs to share expertise, tools (e.g., event software), and volunteers. ● Utilize Harvard's alumni relations office for introductions to club leaders and SIG organizers in the region.	**Strategic Actions:** ● Add an **annual staffing evaluation** to the board agenda to assess needs and gaps. ● Define which leadership tasks should remain with the board versus those that can be delegated to volunteers or student interns. ● Begin planning for future resource needs as the SIG grows.
2. Growth Phase	**Leadership Focus:** ● Continue relationship-building with classmates and key alumni. ● Focus on strategic work: fundraising strategy, major gift cultivation, and partnership development with the university. ● Develop plans to enhance the SIG's long-term impact, including succession planning.	**Delegation Opportunities:** ● Delegate routine communications (e.g., newsletters, social media) to a part-time contractor or student intern. ● Assign event logistics to part-time staff or a dedicated volunteer committee. ● Use CRM tools to automate membership management and reporting, reducing manual work.	**Collaboration Opportunities:** ● Work with Harvard Clubs to establish recurring joint events (e.g., regional networking nights, lectures). ● Partner with other SIGs to jointly hire a part-time staff member for shared responsibilities (e.g., database management, compliance). ● Join regional alumni gatherings hosted by Harvard Clubs for SIG member recruitment.	**Strategic Actions:** ● Conduct an **annual staffing review** to forecast future needs and budget for part-time staff or contractors. ● Identify roles requiring continuity (e.g., database management, social media) and create clear job descriptions. ● Train key volunteers and students for ongoing tasks, ensuring transitions are seamless.

3. Mature Phase	**Leadership Focus:** ● Transition to oversight and governance, ensuring the SIG stays aligned with its mission. ● Cultivate major donors and serve as ambassadors to strengthen the SIG's reputation and resources. ● Develop and evaluate long-term strategic plans, ensuring sustainability. ● Lead efforts to maintain connections with the university, leveraging relationships for mutual benefit.	**Delegation Opportunities:** ● Delegate operational roles (e.g., event planning, database management) to professional staff. ● Contract professionals for technical tasks like compliance and fundraising campaign execution. ● Empower committees to run specific initiatives, allowing board members to focus on governance.	**Collaboration Opportunities:** ● Collaborate with established Harvard Clubs to co-sponsor major events (e.g., galas, anniversaries) with shared budgets. ● Exchange expertise with mature SIGs to improve operations and fundraising practices. ● Use Harvard's larger alumni network to connect members across SIGs, increasing engagement.	**Strategic Actions:** ● Embed an **annual staffing evaluation** into strategic planning sessions. ● Reassess delegation and resource allocation to ensure leadership remains focused on high-impact activities. ● Expand professional staff roles to handle operational growth and complexity, freeing board members to focus on governance.