



**CLUB  
LEADERSHIP  
CONFERENCE** **2017**

May 30–31, 2017

EXECUTIVE SUMMARIES

## **SESSIONS**

---

### **FIRESIDE CHAT**

PAGE 3

### **CLUB MEMBERSHIP & VALUE PROPOSITION**

PAGE 6

### **CLUB PROGRAMS & INITIATIVES**

PAGE 10

### **LEVERAGING TECHNOLOGY**

PAGE 14

### **BEST PRACTICES: CLUB GOVERNANCE**

PAGE 17

### **QUICKFIRE UPDATES FROM SCHOOL DEPARTMENTS**

PAGE 21

## FIRESIDE CHAT

---

**PRESENTERS:** **JANET CAHILL**, Executive Director,  
External Relations, Harvard Business  
School

---

### OVERVIEW

Over the past decade, the number of HBS clubs worldwide has increased dramatically. At the same time, the HBS Clubs Team has grown and developed a more robust portfolio of services to support club leaders through programming, reporting, technology, and more. In the coming months and years, HBS expects to make lifelong learning and engagement a top priority for its alumni initiatives.

### CONTEXT

Janet Cahill discussed the history, the current state, and the future of HBS alumni clubs.

### Over the last 10 years, HBS clubs have grown worldwide.

Today, there are 102 HBS clubs in 49 countries on six continents. In addition, HBS has made significant investments in the HBS Clubs Team. When Janet first joined External Relations, there was one staff member dedicated to the alumni clubs. Today, the HBS Clubs Team is composed of six individuals.



- 102 clubs around the world
  - 75 HBS Clubs
  - 10 HBS Shared Interest Groups
  - 17 HBS Liaisons to Harvard Clubs
- Six continents, 49 countries
  - North America: 46
  - Europe: 20
  - Middle East & Africa: 7
  - Asia-Pacific: 15
  - Latin America: 4
  - Global Shared Interest Groups: 10

### HBS now supports a wide variety of programming for the alumni clubs.

Today, the HBS Clubs Team offers and supports several types of programming for the alumni clubs.

For example, the following programs took place in FY17 (July 1, 2016—June 30, 2017):

- *Club Events with Faculty* – 57 faculty speaking engagements took place at club events and programs.
- *Club/HBS co-hosted events* – including joint receptions, speaking programs, etc.
- *HBX Live*
- *Alumni New Venture Competition* – generated interest from over 170 ventures and included 14 regional competitions. Over 3,000 alumni were engaged throughout the competition.
- *Global Networking Night (GNN)* – 66 alumni clubs were involved and over 5,000 alumni participated.

- *New Admit Outreach* – In round 1 and round 2, 69 clubs contacted 871 admits to welcome and engage the perspective new students.

### Club leadership and programming has become stronger in recent years.

Today, club engagement and activities have become much more robust. In FY16, the annual club registration survey response rate was 94%. There were over 700 alumni volunteers, clubs hosted more than 1,300 events, and 77 clubs offered at least one program series.

Interest in nonprofit and social enterprise initiatives has also grown. In FY16, 34 clubs engaged in pro-bono consulting activities, such as Community Partners. HBS clubs make over \$12 million of in-kind contributions annually to local nonprofits. Many clubs also offer Strategic Perspectives in Nonprofit Management (SPNM) scholarships to local community members and leaders.

*“The time and energy that our alumni volunteers give to the clubs on top of their families, careers, and other nonprofit interests is remarkable to me. They do this out of their deep affinity and affection for the school.”*

– Janet Cahill

### The HBS Clubs Team offers formal support to club leaders in a variety of ways:

- *In-person Programs*. These include the Club Leadership Conference (CLC), the bi-annual Asia-Pacific Club Leadership Meeting (ACLM), and the bi-annual European Club Leadership Meeting (ECLM).
- *Virtual Forums*. Club Connections calls are held each quarter and the Clubs Connections eNews is sent out bi-monthly.
- *Reporting*. The HBS Clubs Team generates reports based on the annual club registration survey, the New Venture Competition and Global Networking Night surveys, and the review of bylaws.
- *Recordings and Summaries*. Recordings from the Club Connections calls and a variety of programs throughout the year are available on the Officers’ Portal.
- *Technology Platform (iModules)*. Alumni data is maintained here.

**Looking ahead, HBS plans to increase its focus on alumni engagement.**

The Clubs Team is continuing to develop stronger regional networks, as well as explore ways to leverage existing and new program opportunities. To bolster alumni engagement, the School now has a resource dedicated to social enterprise.

Programming and initiatives related to continuous learning and continuous engagement is also a priority. Efforts include lifelong learning pilots, and collaborations with Harvard Business Publishing, Executive Education, and HBX Live. The Clubs Team is examining what activities can be leveraged and scaled through the alumni clubs. Executive Education alumni engagement is an additional focus area.

**Action Items**

HBS club leaders offered suggestions for future alumni programs and activities:

- *MBA Refresher Course.* One participant noted that the business world has changed significantly since she graduated from HBS. She would like an MBA refresher program with discounted tuition for alumni.
- *Entrepreneurship and Lifelong Alumni Engagement.* Entrepreneurship is a great way for alumni across generations to connect. It would be helpful to offer programs to promote these connections. It would also be useful to develop programs targeted at mid-career entrepreneurs, since many of the existing activities focus on entrepreneurs in their 20s.
- *Lifelong Learning.* HBS graduates are well-prepared for business, but many are not often equipped to manage many of life's broader challenges. Alumni can often benefit from learning more about the difficulties they may face in life beyond the business-world and how to deal with them.

---

**PRESENTERS:** **ALISON CHAN**, President, HBS  
Association of Hong Kong

**ROBIN GREGG**, Co-President, HBS  
Club of Atlanta

**STEPHEN PITTMAN**, President, HBS  
Association of Boston

**CHIP STINE**, Partner, MSP Digital  
Marketing

**ROY GROSSMAN**, Partner, MSP Digital  
Marketing

**KAREN SHECTER**, Sales Manager, MSP  
Digital Marketing

---

### OVERVIEW

Engaging new and existing members is a continual challenge for HBS clubs. Clubs have taken different approaches to demonstrate their value proposition to new and prospective members. Some clubs have eliminated dues and rely solely on event fees and sponsorships to generate revenue. All offer compelling programming, ranging from social enterprise activities to annual leadership conferences, speaker series, small group activities, and more.

A common thread is the need to communicate clearly and consistently with members. Best practices include segmenting members, personalizing messages, and developing a schedule for regular communications.

### CONTEXT

Alison Chan, Robin Gregg, and Stephen Pittman discussed how their clubs demonstrate their value proposition to members. The team from MSP Digital Marketing offered recommendations about how to make member communications more impactful.

**The HBS Association of Hong Kong strives to connect HBS alumni and to inspire the local community.**

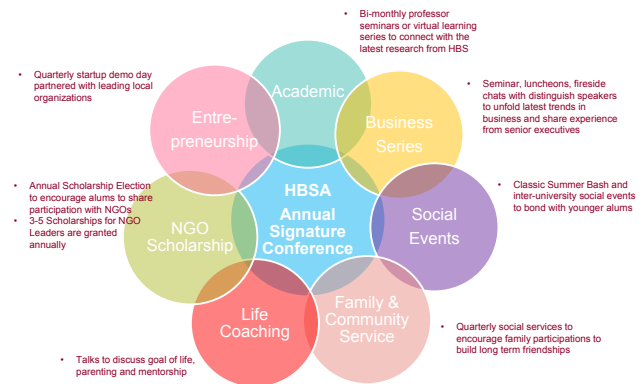
The HBS Association of Hong Kong’s mission is to connect HBS alumni to develop meaningful relationships and inspire one another to grow. It also aims to inspire and contribute to the Hong Kong local community as a group. Alison Chan provided an overview of the club’s membership and activities:

- *Membership is free.* Free membership drives inclusion.
- *The club organizes more than 20 events annually with over 1,500 participants.* When organizing events, the club follows the 1:4:2 rule which balances anchor events with opportunistic events.
  - 1 Anchor event each year. This is the fifth year that the annual signature conference has been held with over 400 alumni and guests.
  - 4 Quarterly events per year. These are usually speaker series.
  - 2 Bi-annual events with different themes to attract alumni from all stages of life.
- *Proactive outreach targets different demographic groups.*
- *Post-event follow-up emails increase member engagement.*

Since the club doesn’t charge membership dues, it prices events to breakeven. Revenue comes from:

1. *Event Fees.* Members are charged at cost and guests pay a 20% premium.
2. *Sponsorship Fees.* At the annual conference, title sponsorship costs USD \$20,000 and corporate sponsorship costs USD \$5,500. Each sponsor is entitled to a table and acknowledgment on the brochure. For regular events, in-kind sponsorship defrays the costs of venues, beverages, interpretation, and transportation. Members are encouraged to host events at their offices.

The HBS Association of Hong Kong hosts events with diverse themes to connect alumni in all stages of life.



*“The HBS Association of Hong Kong provides opportunities for alumni to participate and impact society as a group. We cultivate proud HBS alumni and emphasize lifelong friendship and support.”*

– Alison Chan

**The HBS Club of Atlanta combatted membership declines through marketing campaigns, consistent communication, and quality programming.**

The HBS Club of Atlanta is committed to providing a forum for business issues in Greater Atlanta, as well as supporting nonprofits. The club is one of the most active social/professional networks in Atlanta and the broader business community is welcome at most club events. Historically, between 12% and 15% of the local alumni population have been paid members. However, the club has experienced downward trends in paid membership.

Robin Gregg discussed the club and how the leaders have turned the membership declines around:

- *The club isn’t dependent on membership revenue.* Event pricing is structured to make events breakeven.
- *There is great engagement at events.* Even though membership numbers aren’t high, many alumni attend events.
- *Members form a core of highly engaged alumni.* They attend multiple events and know one another.

- *The club has run campaigns to increase membership.* In the summer of 2016, the club experienced a membership low. To combat the decrease, club leaders initiated several programs. They held a “members only” event at the Federal Reserve Bank, ran a three-month membership drive with discounted pricing, sent targeted communications to different segments, and added a “plus 1” membership level based on member feedback. Today, one-third of members are at premium member levels.

**Today, 1/3 of our members are at the “All You Can Eat” levels - including our new Plus level**

	Basic	President's Club	President's Club Plus	All Other
Annual Rate	\$99	\$299	\$349	
Key Benefits	<ul style="list-style-type: none"> <li>• Admission to members only events</li> <li>• Discounted pricing to events (usually \$10-20)</li> </ul>	<ul style="list-style-type: none"> <li>• Admission to members only events</li> <li>• Free admission to all events (plus discounted pricing for 1 guest)</li> </ul>	<ul style="list-style-type: none"> <li>• Admission to members only events</li> <li>• Free admission to all events (plus 1 guest)</li> </ul>	
% of membership	59%	22%	9%	10%

Based on this experience, the HBS Club of Atlanta offered three key takeaways to other clubs:

1. *Membership is a marketing effort.* Communicating the value proposition and running “campaigns” are essential for success.
2. *Communication efforts must be constant.* Membership numbers tend to drop whenever communication is discontinued.
3. *Quality programming drives membership.* More diverse events attract a broader set of alumni.

*“We structure membership to encourage engagement. Our members form the hub of the club. Even so, we’re not dependent on membership for the club’s financial success. We structure event pricing to make sure events breakeven without membership revenues, and most typically do.”*

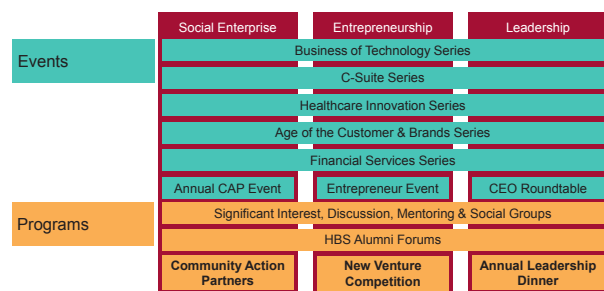
– Robin Gregg

**The HBS Association of Boston realizes its mission through three business pillars, as well as cross-cutting events and programs.**

The HBS Association of Boston’s (HBSAB) mission is to connect HBS alumni and other leaders who make a difference in Greater Boston. The club’s strategy is organized around five elements:

1. *Pillars.* HBSAB organizes some activities around three pillars: Social Enterprise, Entrepreneurship, and Leadership. The pillars are similar to three business units that operate under the leadership of the club’s board. Each pillar has a leadership team, a strategy, either a council or a board, and a liaison from the school.
2. *Community Action Partners* is the core of the Social Enterprise pillar. The New Venture Competition anchors the Entrepreneurship pillar. As part of the Leadership pillar, the club has held an annual CEO roundtable. Plans are underway to also organize an annual leadership dinner.
2. *Events.* These are horizontal activities that span the three pillars. Event series focus on different topics, such as the business of technology, the C-Suite, healthcare innovation, branding, and financial services.
3. *Programs.* These are also horizontal activities, such as small group activities and alumni forums.

Our MISSION is realized across 3 business Pillars. Each Pillar is anchored by a core Program. We connect leaders across these Pillars with meaningful Events and Programs to collaborate, learn & grow.





4. *Memberships.* All 8,000 HBS alumni in Boston are considered HBSAB members and can pay a la carte to attend events. In addition, there are three categories of paid memberships, each with different benefits. The club is currently piloting the Chair's Club level of membership. This is the only membership tier where fees will be paid monthly.

### Membership Model

Chair's Club	\$100*	<ul style="list-style-type: none"><li>• Unlimited VIP access to all events</li><li>• Exclusive access to VIP receptions (select marquee events)</li><li>• Chair's Club rewards program (more details to come)</li></ul>
President's Club	\$30*	<ul style="list-style-type: none"><li>• Unlimited access to all events (excluding Crimson Dinners)</li><li>• Level of membership required for Board of Governors &amp; Officers</li><li>• President's Club rewards program (more details to come)</li></ul>
Executive	\$10*	<ul style="list-style-type: none"><li>• Access to Forums, NVC and CAP program-bundles</li><li>• Access to serve on Club Committees &amp; Task Forces</li><li>• Executive rewards program (more details to come)</li></ul>

\*Monthly Equivalent; 1-yr, 2-yr & 3-yr memberships are available

5. *Sponsorships.* HBSAB currently has four premier sponsors that each pay \$25,000 per year. Club leaders believe the right number of sponsors is three or four. In addition, event series are sponsored and sponsors pay for tables at the annual leadership dinner.

*"I think it's important for the clubs to clearly show examples of us executing our mission and making a difference. One way that HBSAB did this was through a day of service."*

— Stephen Pittman

**To increase the impact of member communications, clubs must use their data, personalize the content, select the appropriate channels, and develop a communication calendar.**

Chip Stine offered four recommendations for HBS clubs, as they work to communicate their value propositions to members:

1. *Use your data.* Audiences can be segmented based on different criteria, such as life stage, past event participation, current members, prospective members, and more.

2. *Personalize your content.* Clubs must strive to deliver the right message to the right person at the right time. As a result, one campaign may need to be tailored to multiple segments.

3. *Choose your channels.* Messages can be communicated through e-mail, direct mail, text messages, Facebook class pages, phone, and more. When sending email, messages should be optimized for viewing on mobile devices. The content must be concise with links to a signup page or other content.

4. *Develop a communication calendar.* The calendar should define which segments will receive different communications and when those communications will be deployed.

### Action Items

- *Don't overlook the value of mission-related appeals.* Some clubs have found that emotional appeals around issues like social enterprise or environmental issues resonate more with members than pitches about the club's value proposition that highlight benefits like discounted events. The HBS Club of Atlanta, for example, highlights its social enterprise scholarships for nonprofit leaders.
- *Small group activities are a good way to reach introverts.* For example, HBSAB has found that some members prefer attending small group events where they can have deeper conversations with other alumni.

## CLUB PROGRAMS & INITIATIVES

---

**PRESENTERS:** **ERIN PATTEN**, Director, Student Affairs, HBS African-American Alumni Association

**NASSAR FARID** Mufdi Ruiz, Board Member, Events & Young Alumni, HBS Club of South Florida

**LANCE STUART**, Co-VP, Programming, HBS Club of New York

---

### OVERVIEW

The most successful HBS clubs offer a variety of events, ranging from professional development opportunities to social events and programs that are co-hosted with other Harvard clubs or alumni clubs from other schools. Club leaders have found that offering diverse programming helps to appeal to members of all ages.

### CONTEXT

Erin Patten, Nassar Farid Mufdi Ruiz, and Lance Stuart discussed how their clubs approach programming and offered lessons learned to other club officers.

**KEY TAKEAWAYS****The HBS African-American Alumni Association plays an active role across the HBS alumni community, while supporting members with professional and social events.**

The HBS African-American Alumni Association (HBSAAA) serves over 2,600 African-American, African, and other HBS graduates who identify with an African-American heritage. The organization is dedicated to building and sustaining a network that engages HBS alumni, current students, and applicants. Its goal is to increase connections with the school and the broader African-American community.

The success and reach of the HBSAAA depends on member support. Erin Patten provided an overview of club membership and benefits:

- Approximately 200 dues-paying members currently support the HBSAAA. This represents 6% of the HBSAAA community. Annual membership fees are \$50 for recent graduates and \$100 for others. A lifetime membership costs \$1,000.
- Membership benefits include event discounts, opportunities to support HBS students and faculty, and access to the HBSAAA network through a searchable database.

The HBSAAA is known for several accomplishments including:

- *Playing an Active Role at HBS.* The club secured \$5.1 million for professorships. The HBSAAA has also endowed nearly \$4 million to the George P. Baker Minority Fellowship. To date, over 160 Baker Fellowships have been awarded.
- *Offering Professional Development.* Since 1997, the HBSAAA has hosted 11 leadership conferences, three equity summits, and two media and entertainment forums. Professors Steve Rogers, Linda Hill, and Shelle Santana launched the HBSAAA-Harvard Club collaboration.
- *Developing Innovative Partnerships.* Each year, the HBSAAA holds a dinner with the HBS Latino Alumni Association. In addition, the club has hosted several dinners and events in the New York, Washington, DC,

and Chicago regions. These included a dinner honoring Wynton Marsalis and a talk with ballerina Misty Copeland. The HBSAAA also hosted a joint social in Accra, Ghana with Harvard Law School alumni and students.

*“Since the HBSAAA has raised \$5.1 million, it has given us a stronger platform to advocate for diversity in the faculty population. Over the past three to four years, HBS has ramped up to eight African-American professors. We’re very proud to influence in that way.”*

– Erin Patten, HBS African-American Alumni Association

**The HBSAAA’s Global Ambassador Program and the upcoming 50th Anniversary Conference drive alumni engagement.**

The Global Ambassador Program was launched in the fall of 2016 with 20 HBS alumni volunteers in 12 cities. The program delivers several benefits, including consistency with the “One Harvard” initiative, a greater sense of community, increased club membership, and broader club reach.

The ambassadors work with local clubs to publicize existing events and to recommend speakers and topics of interest to its members. Ambassadors also organize stand-alone HBSAAA events such as speakers and dinner series.

The HBSAAA’s hallmark event, which is planned for April 2018, is the African-American Student Union (AASU) 50th Anniversary Conference and Celebration. HBSAAA is spearheading several initiatives, such as:

- Soliciting volunteers to lead event planning and execution
- Organizing an event series to energize alumni
- Hosting a membership drive to expand reach and increase event attendance
- Fundraising and sponsorship activities
- Collecting archived materials highlighting the history of African-American presence at HBS
- Connecting with AASU student leadership to begin relationship-building

**KEY TAKEAWAYS****The HBS Club of South Florida sponsors diverse events to attract alumni of all ages.**

The HBS Club of South Florida is a mid-sized club, with 120 dues-paying members. The club's programming falls into three categories:

1. *Young Alumni Events.* Examples include the HBS Supper Club, the Harvard vs. Yale Miami Watch Party, and an evening of history and mini-golf at the Coral Gables Museum. In addition, happy hours are held on a monthly basis. These events are sometimes hosted with All Ivy.
2. *Cultural and Community Events.* The HBS Club of South Florida recently held an evening of Picasso and art, a tour of the American Museum of Cuban Diaspora, a hard hat tour of the new Frost Museum of Science, an Everglades airboat and walking tour, and a private tour of the Art Basel exhibits in Miami. The club's signature annual event is the HBS Leadership Dinner. At this dinner, a business leader is honored and the club awards a scholarship for the Strategic Perspectives in Nonprofit Management program to an up-and-coming nonprofit leader.
3. *Professional Education Events.* The club has held several programs such as "What Great Service Leaders Know and Do: Creating Breakthroughs in Service Firms"; "Calm Assertive Leaders; Beyond Surviving Work and Life to Thriving"; an evening with Ben Baldanza, the CEO of Spirit Airlines; and "The Power of Memory."

In addition, the HBS Club of South Florida partners with other alumni clubs. The club collaborated with the Chicago Booth Club on a program that explored startups and disruption of South Florida industries. The South Florida club also co-hosted "The Exit of Brexit" with the Harvard Club of the Palm Beaches. Club members have attended the Miami Open, Alvin Ailey's American Dance Theater, and the King and I with members of All Ivy.

*"Make sure you take advantage of the robust cultural institutions in your cities. It's also helpful to tap into the HBS alumni network wherever you can."*

— Nassar Farid Mufdi Ruiz

**The HBS Club of New York's programming engages alumni, creates community impact, and fosters leadership and lifelong learning.**

The HBS Club of New York (HBSCNY) is a large-sized club with 1,400 members. Lance Stuart highlighted several statistics:

- The Co-VP of Programming works with the Co-VP and full-time Programming Manager to review and approve event proposals, develop procedures, and more.
- The Annual Leadership Dinner funds the club's operations and scholarships programs. Each year, the club hosts around 120 profitable or breakeven events. During the academic year, the club often runs three to four events a week. Very few partner events are held.

In addition to the Annual Leadership Dinner, HBSCNY's major activities include:

- *Alumni Angels.* The club has one of the largest angel investing groups in New York City, with over 300 members and \$8 million invested in more than 55 start-ups.
- *Alums in the Alley.* HBSCNY had the most NVC applications of any region and one team was crowned the first Best Early Stage Entrepreneur. The club's inaugural Entrepreneurship Conference attracted over 100 attendees.
- *Community Partners.* The club provides over 14,000 hours per year of pro bono consulting to local nonprofits. It recently awarded the second Community Partners Leadership Award, honoring local nonprofits.
- *Skills Gap.* This program fosters business-academic collaboration for skills training, as well as internships in healthcare, technology, and more.
- *Seniors Programs.* These include monthly brown bag and "Nothing Special" lunches, and daytime programs.

*"HBSCNY's programming provides direct value to members and the broader HBS community. Our programs promote the HBS and HBSCNY brand broadly through a diverse array of high-quality business, cultural, and social events."*

— Lance Stuart

**KEY TAKEAWAYS**

---

**Action Items**

The speakers offered 10 recommendations related to club programming:

1. Host *consistent events* to cultivate consistent member engagement.
2. Offer a *variety of events* to generate attendee variety.
3. Remember that *local cultural institutions* are a great resource for innovative programs.
4. Don't overlook the *HBS network as a source of speakers*.
5. Consider *partnering with other local alumni clubs* to further mutual goals.
6. Strive to *find sponsors* who will provide free event venues and refreshments.
7. Look for prospective *speakers on other clubs' websites*.
8. *Be creative in looking for sponsors*. Ask speakers and their companies' vendors (e.g., accounting and law firms) to become sponsors.
9. *Source speakers* through law, accounting, and consulting firms.
10. *Pay it forward* by asking speakers to address other clubs.

## LEVERAGING TECHNOLOGY

---

**PRESENTERS:** **MARCO VIERA**, Associate Director,  
Alumni Technology, External Relations  
IT

**TED ADAMS**, Director, Digital  
Communications, External Relations

---

### OVERVIEW

HBS clubs have access to a robust technology infrastructure to support their activities. The HBS External Relations team continues to develop web-based and mobile tools to enhance information sharing between clubs and alumni. Now that the iModules technology platform has been widely adopted by the clubs, HBS is turning its attention to developing a comprehensive support model.

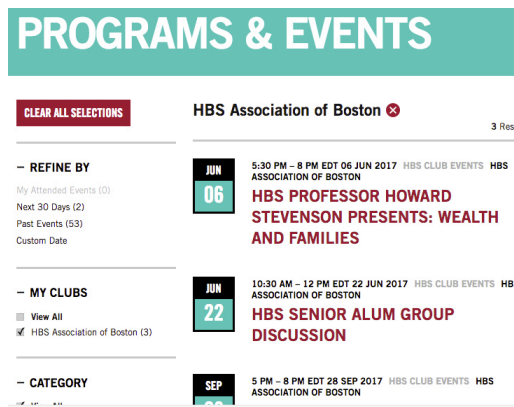
### CONTEXT

Ted Adams and Marco Viera discussed new web-based and mobile tools available to clubs, as well as the new support model for iModules.

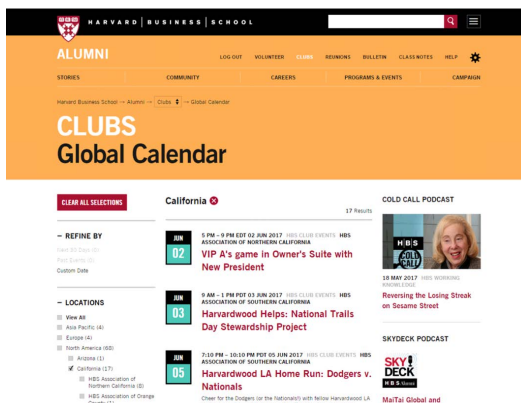
Several new web-based and mobile tools are available to clubs.

Four new tools are:

1. *Programs & Events Page.* “My Club Events” appear on this page. The programs and events page expands outreach for clubs, since users can see events that are planned by all clubs in their region.

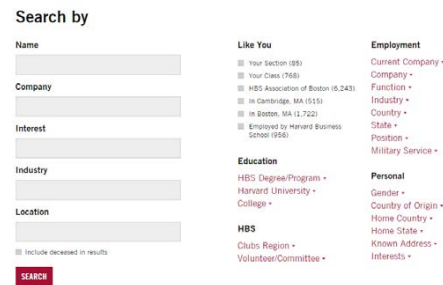


2. *Global Calendar.* This tool will launch in June 2017. Events for all clubs on iModules will be presented on a global calendar in one view. The global calendar also includes regional and shared interest groups events. Events can be sorted by location and further refined by different criteria.



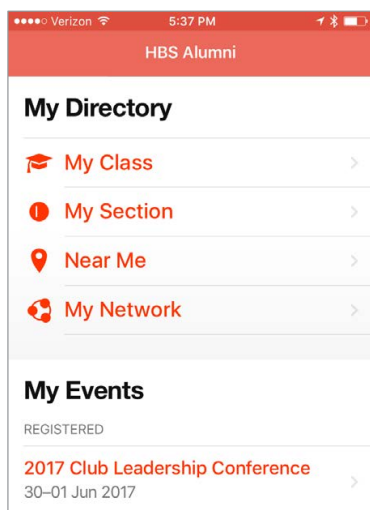
3. *Alumni Directory.* The new Alumni Directory interface offers all the search categories on the first screen. Frequently used filters appear on the left and more advanced features are listed under “More Search Refiners.” The Quick View Profile shows important information at a glance, as well as a link to the full profile for a deeper look. The Quick View Profile also includes links to “Send a Message” and download a vCard.

Search tools include options to print, send a message, and download results to an Excel spreadsheet. To prevent spam, the download functionality does not include email addresses. The team is exploring the option to



print mailing labels from the directory.

4. *Mobile App*. This tool was released in May 2017. From mobile devices, users can access My Directory, My Events, My Class Notes, Alumni News, and the Alumni Bulletin, as well as event listings, directory search, messaging, giving, and more. Users can send suggestions for improvement back to HBS via the feedback link.



*“The new HBS alumni mobile app provides access to useful information wherever and whenever alumni need it.”*

— Ted Adams

**Now that the Club Technology Platform is in steady state, the team is developing a support model.**

The iModules platform offers several benefits to clubs. All clubs have access to a consistent tool with HBS branded design. Since iModules is integrated into the HBS Alumni Experience, alumni can access their unified profile and easily manage their login. In addition, iModules supports auto-provisioning at graduation and throughout life changes as alumni move. It also supports affiliation based on region and interest.

From a technology perspective, the iModules platform is funded and maintained by HBS IT. HBS handles backups, recovery, and security. Same-day synchronization with alumni profile updates is supported.

To date, 80 clubs have migrated to iModules. As of July 2017, the system will be in steady state. Now attention is turning to developing a support model. Going forward, clubs’ technology will be supported by HBS’ Alumni Technology team. The model will include a support portal, training for new admins, online resources, and more.

*“The goal of our support model is to insulate clubs from technology and to focus instead on what they want to accomplish.”*

— Marco Viera



---

**PRESENTERS:** **BILL LE SAGE**, Vice Chairman, HBS Club of Houston

**PAT KELLY**, Treasurer, HBS Association of Northern California

**ROGER COLE**, President, HBS Club of Connecticut

---

**OVERVIEW**

Although club governance isn't always exciting, it cannot be overlooked. The board, bylaws, and minutes ensure that clubs function smoothly on a day-to-day basis, as well as when problems arise. The treasurer plays a central role in club operations, handling a wide range of activities from contracts and insurance to budgets, cash management, tax filings, regulatory compliance, and more.

As clubs strive to attract and engage members, cross-club collaboration with other HBS, Harvard, and outside organizations can be an effective way to bolster event attendance and networking activity.

**CONTEXT**

Bill Le Sage, Pat Kelly, and Roger Cole discussed club governance and the treasurer's duties, as well as the benefits of collaboration between clubs.

**Boards, bylaws, and minutes help ensure fairness, transparency, and trust within clubs.**

Bill Le Sage offered governance tips to club officers:

- *The board must reflect the club’s stakeholders.* When recruiting board members, the most important characteristics are integrity and motivation. It is essential to understand why individuals want to join the board.

The HBS Club of Houston looks for candidates willing to give their time, talent, and treasure. The club created a formal nomination committee to proactively manage appointments of new board members. This committee’s efforts have resulted in a more diverse board for the club.

**Proactively Manage the Outcome**

Demographic Profile	Old Board	New Board
70 and up	20%	13%
60-69	66%	33%
50-59	0%	13%
40-49	0%	20%
39and under	20%	20%
MBA	100%	80%
Exec. Prog / DBA	0%	20%
Female	20%	27%
Male	80%	73%
White	80%	73%
Black	0%	7%
Hispanic	0%	0%
Asian/	0%	13%
Other	20%	7%
Houston	80%	80%
Katy	0%	0%
Sugarland	20%	7%
Woodlands	0%	13%
Pearland	0%	0%
Galveston	0%	0%
Breakfast Forum	80%	53%
Community Partners	20%	27%
Supper Club	20%	13%
Executive Lunches	60%	73%
Membership	40%	53%

Areas of expertise	Old Board	New Board
Business	100%	93%
CEO of a Corporation	60%	27%
Board Experience	80%	67%
Community Service	20%	40%
Education	0%	13%
Retired	20%	20%
Consulting	60%	47%
Finance (CFO)	40%	33%
Fund-Raising	60%	33%
Government/Public Policy	0%	13%
Accounting	40%	27%
Investment	80%	47%
Legal	0%	7%
Marketing	40%	33%
Self Employed	80%	40%
Public Relations	0%	13%
Oil & Gas	60%	53%
Medical Center	20%	7%
NASA	0%	7%
Ability to obtain speakers	0%	33%
Geographical Diversity	0%	13%
Social Services	0%	7%

- *Bylaws define rules and responsibilities for members, directors, and officers.* Bylaws clarify how to handle elections, term limits, and sitting board committees. Bylaws also provide guidance if things go wrong. In some cases, an officer or director may need to be removed, or a board may need to assume more control. A club’s bylaws should describe “Fundamental Acts” for which a higher level of care and attention beyond a majority vote is required.

Bylaws build in flexibility. They describe the process for filling vacancies, identify who stands in if the president or chair is unavailable, articulate the difference between officer roles, and more. The HBS Club of Houston has included program reviews and renewals within its bylaws. The club also incorporated the HBS Clubs and Associations Operating Guidelines into the bylaws.

- *It is advisable to maintain a club minute book.* Minutes record motions and their outcomes, but don’t serve as a transcript of meetings. Guidelines on how to take minutes can be found at [wikiHow](#).

**Club treasurers are responsible for a great deal, from insurance to budgeting, cash management, contracts, and more.**

Pat Kelly shared her treasurer’s checklist:

- *D&O Insurance.*
- *Reporting to the Board, President, and Executive Director.*
- *Establishing Procedures and Policies for Paying the Bills.*
- *Creating a Budget.*
- *Managing Cash.*
- *Handling Tax Filings and 501(c)(3) Compliance.*
- *Managing Contracts.*
- *Maintaining Records and Conducting Audits.*

The HBS Association of Northern California’s calendar of activities and events shapes when the treasurer must initiate various actions.

**Treasurer’s Calendar**

	Event	Action
July	FY BEGINS	Budget set
August	Board Offsite	Report to Board
September		<i>Start tax filing</i>
October	Board Meeting Gala Dinner	Report to Board Contracts, tax letters
November	Tax Filings Due	<i>CPA files</i>
December	Board Meeting	Report to Board
January		<i>Start budget process</i>
February	D&O Renewals	
March	Board Meeting	Report to Board Present Draft Budget
April		
May	Gala Dinner	Contracts, tax letters
June	Board Meeting	Report to Board Budget Approved

*“Internal controls are meant to keep honest people honest. They keep the stress levels down.”*

– Pat Kelly.

**KEY TAKEAWAYS****Treasurers pay the bills, help run the club, and report on finances.**

The club treasurer's routines and tasks fall primarily in three areas:

1. *Paying the bills.* The typical cycle is that the executive director requests payments; the bookkeeper records deposits, generates checks, and reconciles accounts; and the treasurer signs checks, reviews transactions, and generates reports.

The HBS Association of Northern California has implemented several safeguards to prevent fraudulent activity. No single person handles a transaction from start to finish. In addition, for checks over \$10,000, two signatures are required. Having these safeguards in place can help prevent being hacked.

2. *Running the club.* The president sets the agenda, the executive director executes the plan, and the treasurer maintains the budget. The treasurer works closely with the president on the agenda to determine whether the club has adequate funds to achieve its goals and to decide whether to spend reserves.
3. *Reporting on finances.* Reporting protects the board and the club. Board members can be sued for neglecting club finances. The treasurer reports on financials and reserves, makes projections, and identifies areas of concern.

**Cross-club collaboration is a proven way to increase event attendance and enhance networking opportunities for members.**

The HBS Club of Connecticut has had several positive experiences with cross-club collaboration. Roger Cole outlined why cross-club collaboration is beneficial:

- *“Critical mass” for events.* Collaboration leads to higher numbers of attendees at events. This allows clubs to disburse the fixed costs of events, such as venue fees, across groups.

- *Access to speakers.* Collaboration opens doors to speakers that might not be readily available to HBS-only engagements.
- *Broader networking opportunities.* Collaboration brings diverse groups of people together, which creates networking opportunities beyond the HBS alumni community. In addition, collaboration makes it easier for alumni in “border” areas to connect with alumni in other regions.
- *Connections with HBS shared interest groups.* Joint events are a great way for clubs to interact with SIGs that do not have a physical presence.

Potential partners for cross-club collaboration fall into three categories:

1. *HBS Clubs.* These include alumni clubs in neighboring regions, as well as special interest groups. The HBS Club of Connecticut recently participated in the HBS women's social in Darien, Connecticut, which was co-hosted with the HBS Women's Association of Greater New York.
2. *Harvard University Clubs.* These include Harvard Alumni Association (HAA) organized “Harvard Clubs,” as well as HAA SIGs and Harvard graduate school alumni groups. The HBS Club of Connecticut worked with the Harvard Club of Fairfield County on an event called “How to Disrupt Asset Management.”
3. *Other Groups.* These include alumni clubs from peer business schools and various professional groups. The HBS Club of Connecticut collaborated with the CFA Society of Stamford on an event titled “Bitcoins and Other Crypto Currencies.” The club also co-hosted “What King Solomon Didn't Know About Negotiation” with the Yale School of Management.

*“Why collaborate with other clubs? Number one is critical mass for events. Number two is access to speakers. Number three is broader networking opportunities for HBS alumni.”*

– Roger Cole

**KEY TAKEAWAYS**

---

**Action Items**

- *Build a strong board of directors.* Good people create good outcomes. Educate the board about their responsibilities.
- *Create a comprehensive set of bylaws.* Best practices include focusing on stakeholder groups, planning for missteps, and building in flexibility.
- *Record and store what the board has decided.* Otherwise those actions don't count.
- *Develop a checklist of the treasurer's duties.* Ideally, the key activities should be laid out in a calendar.
- *Establish segregation of duties.* Internal controls limit errors, fraud, and hacking.
- *Maintain transparency.* This makes oversight easier.
- *For co-hosted events, maintain the same pricing across all groups.* This leads to a fair allocation of costs.
- *When collaborating on events, handle registration on one club's website.* Steer all traffic to a single website for simplicity.
- *Coordinate event calendars with neighboring HBS and Harvard clubs.* This avoids potential conflicts.
- *Confirm whether insurance is required for club volunteers.* They are not usually covered by D&O insurance.
- *If a hack occurs, determine what actions must be taken.* The club may need to report the incident to the police or another regulatory authority. There may also be state requirements which require organizations to disclose the hack to members.
- *Information on administrative back office services.* The HBS Clubs Team will cover third-party administrative back office services in a future Club Connections call and in Club Connections eNews.

## QUICKFIRE UPDATES FROM SCHOOL DEPARTMENTS

---

**PRESENTERS:** **JANA KIERSTEAD**, Executive Director,  
MBA Program

**CHRISTOPHER GANT**, Director,  
Corporate Relations, Executive  
Education

**KRISTEN FITZPATRICK**, Managing  
Director, Career & Professional  
Development

---

### OVERVIEW

The HBS community provides support to students and alumni throughout their lives. The MBA program continues to thrive. The faculty and staff are always looking for ways to improve the educational experience for students. HBS has bolstered its offerings for executives seeking professional development. Opportunities exist for residential learning, online education, and custom programs. The Career & Professional Development Team has developed a robust portfolio of resources to help alumni thrive in their work lives.

### CONTEXT

Jana Kierstead provided an update on the MBA program, Christopher Gant discussed Executive Education programs, and Kristen Fitzpatrick reviewed the Career & Professional Development resources available to alumni.

**KEY TAKEAWAYS****HBS continues to attract strong applicants and deliver innovative business education.**

Jana Kierstead provided an overview of admissions, the student experience, and academics at HBS.

- *The health and wellness of admissions is strong.* Over the next two to three years, attention will turn to pipeline development and attracting people who traditionally haven't considered an MBA.

*“Applications are over the 10,000 mark and all signals are good. The quality of the applications is high. We are finished with all our admits and now we're working on yield. Right now, the health and wellness of admissions feels pretty good.”*

– Jana Kierstead

- *The student experience this year was atypical due to politics and immigration issues.* Students engaged in difficult conversations and did so with poise. Since 30% of the MBA class is international, many were anxious about immigration issues. One student created the website “**Hi From the Other Side**” to promote dialogue about political issues.
- *On the academic front, innovation continued.* Last year was the FIELD program's five-year anniversary and significant changes were made after a program evaluation. FIELD One was extended in term one and FIELD Two (the global immersion) was moved to the end of the second semester. Students now travel for FIELD after completing courses like Big E and Strategy.

A new capstone, integrative exercise called the Board Room was introduced into the required curriculum at the end of the first year. Students worked on a case as a team and met with their “board” which was composed of alumni. The students presented their recommendations and negotiated throughout the day with the board. At the conclusion of the exercise, the case protagonists spoke to the first-year class and the 500 alumni who were on campus. The students and alumni loved it. This is a program that HBS would like to repeat.

**HBS Executive Education is constantly launching new programs on campus, around the world, and at client sites.**

Last fiscal year, just under 11,000 people were engaged in an Executive Education program. This year, HBS is on track to serve over 11,000 Executive Education participants. Some of those students will attend programs at HBS facilities in Shanghai and Mumbai.

In addition to the two-year full-time MBA program, HBS offers open enrollment Executive Education programs segmented based on seniority and span of control. The four programs below offer alumni status pathways:

- *Advanced Management Program.*
- *General Management Program.*
- *Program for Leadership Development.*
- *Owner/President Management.*

Other forms of executive development include:

- *Online Corporate Learning.* This is offered by Harvard Business Publishing through Harvard ManageMentor. Harvard ManageMentor is a database with management tips and tricks on different topics.
- *HBX Core.* The target audience for this offering is recent college graduates who want to acquire business acumen skills so they can hit the ground running in the workforce.
- *Custom Programs.* These programs are designed for groups of 50 to 200 employees within a company. The curriculum is aligned with the senior leadership team's vision for the future of the business.

HBS Executive Education has several new programs planned for FY18:

- *Women on Boards.*
- *Regionally Focused Programs*
- *HR-Executive Suite Connection.*
- *Hybrid Custom Program/Harvard Business Publishing/HBX.*

**KEY TAKEAWAYS**

---

Looking ahead, a new Executive Education program is under development that will be available only to HBS MBA alumni.

*“Our leadership programs are routinely oversubscribed. But all products have a life cycle and that applies to Executive Education programs as well. We are always innovating new programs and deciding what programs need to be refreshed.”*

– Christopher Gant

**HBS Career & Professional Development offers numerous in-person and online resources for alumni.**

Kristen Fitzpatrick provided an overview of the career resources available to HBS alumni:

- *Coaching.*
- *Webinars.*
- *LinkedIn Profile Reviews.*
- *ReBoot Camps.*
- *Alumnae Circles.*
- *Job Postings.*
- *MBA Career Advisors.*
- *Resource Library.*
- *Harvard ManageMentor.*

*“If you have interacted with a coach, you know they can move you forward and serve as an impartial person to bounce ideas off of and to ensure you’re on the right track. Our coaches can save you time. My main takeaway for today is take advantage of our coaching resources.”*

– Kristen Fitzpatrick

**Action Items**

- *Welcome Executive Education graduates to HBS Clubs.* Unfortunately, many Executive Education alumni feel secondary to MBA alumni at the clubs. Clubs may want to adjust their outreach and welcome messaging for Executive Education graduates.
- *Recruit Executive Education Alumni for Club Membership.* This topic may be addressed in a future clubs connections call. Club officers expressed interest in learning when people from their regions are admitted to the Executive Education programs. This would enable them to reach out to them.