

2007-2008  
MIT Club Officers  
Volunteer Manual



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# Introduction

## WELCOME

Thank you for accepting a key leadership position in your local Club! As a volunteer for the MIT Alumni Association, you are a valuable contributor to the Association's mission of service to alumni. The network of regional groups is the Association's largest person-to-person outreach program—reaching nearly 100,000 MIT alumni worldwide each year. A successful Club is the result of the dedication and hard work contributed by Club officers like you.

This year, you will be carrying out a very important service for MIT, the MIT alumni community and the Association. We hope that you will find it to be a rewarding and enriching experience!

## HOW TO USE THIS MANUAL


This manual is designed to be your resource guide during your term as a Club officer. We advise that you read it through once and refer back to each section as you need more specific information.

**The pages are designed to be easily reproduced so that you can copy specific information and pass it along to other officers and Board members.** It will neither replace nor supplant the need for active and concerned individuals at the local Club level. It includes observations and suggestions made by alumni like you who have served previously as Club officers.

We hope you will find this manual a useful resource for everything from starting a new MIT Club to learning helpful hints about MIT's legal and insurance policies. The manual is also available in pdf format on the web at <http://alum.mit.edu/ccg/clubs/toolkit>. Please share this link with your volunteers.

If you can't find the information you need, please contact us—we're here to help you! Suggestions for improvement of future editions of this manual are welcome and should be sent to your Alumni Affairs Officer.

Thank you again for all your hard work on behalf of MIT.



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## A. Criteria for and Requirements of an MIT Club

### CRITERIA FOR AN MIT CLUB

For an alumni organization to have the designation "MIT Club," the approval of the MIT Alumni Association (Association) Board of Directors is necessary.

#### The Association classifies Clubs by size into these three categories:

Small Club: Fewer than 399 alumni in designated area

Mid-Size Club: Between 400 and 999

Major Market Club: Greater than 1000

#### To be an official active MIT Club, the group must meet the following minimum standards:

- Maintain a set of official Club bylaws with a copy on file at the Association office
- Have active officers and an active Board in accordance with the bylaws
- Maintain a viable base of dues-paying membership with a minimum goal of 10% of total alumni population in the Club area
- Hold a minimum of two Club events per year
- Represent the Club at the annual Alumni Leadership Conference (ALC)

#### In addition, all groups using the MIT Club designation shall:

- Demonstrate that it is formed to promote the interests of MIT and its alumni by maintaining a mutually beneficial relationship
- Recognize that pronouncements can only be made in the names of the individuals, rather than in the name of the Association or its branch organizations
- Extend membership to all MIT alumni and parents of current MIT students and hold all events in facilities where all individual are welcome on an equal basis
- Use alumni mailing lists and labels solely for the purpose of announcing upcoming MIT alumni events and activities recognizing this information is confidential
- Relay news of the Institute to alumni
- Convey alumni interests and concerns to the Association staff
- Update Association staff about Club activities by providing ongoing documentation such as minutes of meetings, accurate event attendance numbers and event evaluation for faculty and senior MIT Administration speakers
- Complete and submit an Annual Report to the Association by July 15 of each year.

#### CLUB RESPONSIBILITIES TO ALUMNI

- Encourage broad alumni representation in Board composition
- Encourage broad alumni attendance at Club events
- Build connections among alumni
- Plan programs and events that represent MIT, designed and delivered with the highest attention to quality, and are accessible and practical
- Ensure broad representation and fresh perspectives among Club leadership through periodic turnover of Club leaders and Board membership
- Provide opportunities for alumni to reconnect with each other and the Institute and to support the Institute through class reunions, admissions work, and annual giving programs

## **CONCEPT AND ROLE OF AN MIT ALUMNI AREA REPRESENTATIVE**

An MIT Alumni Area Representative is appointed by the AAO responsible for the territory, for a two-year renewable term in areas where there is no active MIT Club. Each Area Representative will serve as the primary contact person and link between the alumni in his/her area and the appropriate AAO and thus the MIT Alumni Association and the larger MIT community. In order to effectively serve the alumni in each area and the MIT Alumni Association, the following guidelines have been established:

### **Role of an MIT Alumni Area Representative**

- Access list of alumni in the areas through the Infinite Connection.
- Local event organizer: In a situation when an MIT senior administrator or faculty member is scheduled to be in the local area, the Area Rep should advise the AAO on location, venue, event format, etc. that would be appropriate to the area.
- MIT's "Eyes and Ears": Periodic communication with the AAO, communicating concerns of local alumni and feedback from MIT events in his/her area.
- MIT Spokesperson: Representing MIT and the Association to alumni in area, communicating appropriate messages when deemed necessary.
- Local alumni identification: Identify area alumni to be cultivated as alumni volunteers and prospects.
- Serve as volunteer contact person for alumni who are receiving special publicity through local media and notify MIT.
- Serve as conduit of information updates for lost and/or moving alumni.

### **MIT Area Representative Regions**

The following distinguishing parameters have been established for the MIT Area Representative-appropriate regions.

- Fewer than 100 alumni in the area; and/or
- Unable to sustain more than one event per year; and/or
- Primarily an individual alumnus in leadership; no sustainable leadership group.

Once a geographic area is able to sustain the basic requirements of an MIT Club, it can be recognized by the Association at the appropriate level of organization.

### **Term of Office**

The official term of an Area Representative will be two years. Upon completion of a term, the Area Representative may be re-appointed at the discretion of the AAO, to continue for another term with limitation of up to three consecutive terms or a total of six years served. The Area Representative should serve as an advisor to the AAO in the identification and selection of another alumnus to succeed him/her.

### **INACTIVE CLUB**

The Association reserves the right to deactivate a Club that may have been previously active but from which the Association has no record of Club activity or active volunteer leadership within the last two years. Clubs that are inactive for two years or more will be considered defunct until such time as the Club elects new officers and has some sustaining events.

## B. Club Organization and Structure

### MISSION OF CLUBS

The Association's off-campus mission is accomplished largely through the worldwide network of MIT Clubs. The mission of MIT Clubs is to support and promote, through the broadest possible alumni base, the basic purposes of the Association, which are:

- to build alumni involvement and commitment to MIT;
- to encourage financial support of MIT and its alumni;
- to enhance the public image and presence of MIT through its alumni;
- to strengthen the connections between alumni and to provide services to alumni.

### CLUB BYLAWS

All MIT Clubs are required to have, and to operate according to, a set of bylaws. The Association provides a generic set for Clubs to adapt to their specific requirements. Whether or not a Club chooses to use the Association's bylaws, a current and signed set must be sent to the Association in order for the Club to be approved. Make sure to regularly update your by-laws to keep them current.

### RECOMMENDED BOARD POSITIONS

Primary responsibility for the operation of a Club is in the hands of the Club officers and board of directors. To the extent possible, an MIT Club in any given area should serve as the "link" organization uniting all MIT organizations that exist in the Club area. The following is a suggested listing, by Club size, of the most probable leadership positions for a Club (boldfaced positions are crucial for the successful operation of your Club):

#### **Small**

(fewer than 399 alumni)

#### **President**

President-elect

#### **Treasurer**

Secretary

#### **VP of Programs**

#### **VP of Membership**

Nominating Committee Chair

Affinity Groups Rep.

Educational Council Chair

Enterprise Forum Chair

Sloan Club President

Club Counsel

Board of Directors

Senior Advisory Group

#### **Mid-Size**

(400-999 alumni)

#### **President**

President-elect

#### **Treasurer**

#### **Secretary**

#### **VP of Programs**

#### **VP of Membership**

#### **VP Communications**

#### **Nominating Committee Chair**

Newsletter Editor

Career Development Chair

MIT10Chair

Affinity Groups Rep.

Educational Council Chair

Enterprise Forum Chair

Sloan Club President

Club Counsel

#### **Board of Directors**

Senior Advisory Group

#### **Major Market**

(greater than 1,000 alumni)

#### **President**

#### **President-elect**

#### **Treasurer**

#### **Secretary**

#### **VP of Programs**

#### **VP of Membership**

#### **VP Communications**

#### **VP Electronic Communications (Webmaster, email list editor)**

#### **Nominating Committee Chair**

Newsletter Editor

Career Development Chair

MIT10 Chair

Affinity Groups Rep.

Educational Council Chair

Enterprise Forum Chair

Sloan Club President

Club Counsel

#### **Board of Directors**

Senior Advisory Group

Note: We suggest whenever possible that any formal MIT group have a representative on the Club Board to further enhance the Club's function as the link for all alumni geographically.

### **AFFINITY GROUPS**

MIT alumni are a diverse group representing many nationalities and ethnic backgrounds. Because there are many special interest support groups while students are on campus, many alumni choose to continue those links by starting local MIT special interest groups under the auspices of the MIT Club. More information on Affinity Groups can be found at <http://alum.mit.edu/ccg/affinity/index.html>. The following groups have been organized and have official status within the Association. Except for AMITA, all interested alumni must self-identify to become a constituent of these groups.

**AMITA**—Association of MIT Alumnae, **BAMIT**—Black Alumni of MIT, **BGALA**—Bisexual, Gay and Lesbian Alumni of MIT, **CAMIT**—Chinese Alumni of MIT, **LAMIT**—Latino/a Alumni/ae of MIT, **MITAAA**—MIT Arab Alumni Association, **MITSAAA**—MIT South Asian Alumni Association, **Enterprise Forum®**, **Educational Council**, **Sloan Club**, **Parents Association**

### **SELECTION OF CLUB OFFICERS**

Should your Club follow the Association by-laws sample provided, all officers should be elected for a term of one year, with elections taking place at either the Board meeting or the Annual meeting in May or June. The term of office generally begins on July 1<sup>st</sup> of each year and ends on June 30<sup>th</sup> of succeeding year.

It is recommended that officers do not succeed themselves and that there be a line of progression from Vice President to President-Elect to President. All officers should have served as Board members, and the terms of the Board should be staggered and limited to not more than five years.

The President must appoint a Nominating Committee at least two months prior to the election. This committee should consist of three to five active Board members who nominate one person for each office. The committee then reports its recommendation to the Board prior to the meeting in which the election is held. Further nominations may be made from the floor at any Club event.

Consult your Alumni Affairs Officer (AAO) before the Nominating Committee meeting. He or she can provide some assistance in identifying likely officer or board member candidates by using the Association database to search for active alumni. There are approximately 7,000 alumni volunteers worldwide, and you may not be aware of fellow local alumni who are active in their class, affinity group, or in the Educational Council. These alumni may make excellent additions to your team. Printed reports of all present and former volunteers in your geographic area are also available.

### **BRIEF JOB DESCRIPTIONS FOR KEY POSITIONS**

#### **President**

- Convenes, sets agenda and presides over all meetings
- Ensures Club meets official MIT Club criteria
- Selects committees and appoints chairs
- Acts as the primary liaison with the Association and the AAO
- Completes Association annual report
- Attends annual Alumni Leadership Conference (ALC) or ensures Club representation at the conference

**President-Elect**

- Serves as the understudy to the President
- Assists the President in the management of Club operations
- May focus attention on volunteer recruitment, retention, and leadership succession

**Treasurer**

- Maintains Club's checking, savings, and other financial accounts
- Pays all Club bills
- Reports regularly to the Board about Club finances
- Files appropriate tax forms and sends copies to Association

**Secretary**

- Takes minutes and maintains records of all Board meetings
- Files copies of Board meeting minutes with the Association
- Keeps records of alumni in the Club area

**VP of Programs**

- Establishes goals for the number and type of events Club will host
- Recruits and directs volunteers for events and activities
- Creates program subcommittees as needed
- Convenes, sets agenda and presides over Program Committee meetings

**VP of Membership**

- Convenes, sets agenda and presides over membership committee meetings
- Establishes and executes an annual membership solicitation plan for the recruitment and retention of dues-paying members
- Provides the Association up-to-date information including lists of dues-paying members and address changes

**VP of Communications**

- Sets standards for Club communications pieces in accordance with Association guidelines
- Develops mailing schedule in conjunction with the Club Program Committee
- Maintains records of Club's U.S. Postal mailing indicia, if one exists
- Determines production procedures for Club mailings
- Creates a communications subcommittee as needed, members of the subcommittee may include
  - Club Webmaster
  - Club Email List Editor
  - Newsletter Editor

**Newsletter Editor**

- Sets standards for Club newsletters in accordance with Association guidelines
- Solicits information, writes, edits material for newsletter
- Works closely with the President and VP of Programs to ensure that the newsletter reflects a broad spectrum of alumni and Association interests
- Create a Newsletter subcommittee as needed

### **Career Development Chair**

- Primary Club liaison with the Association Career staff
- Develops career-related services or programs in conjunction with the President and Program Committee
- Creates a Career subcommittee as needed

### **MIT10 Chair**

- Develops MIT10 related services or programs in conjunction with the President and Program Committee
- Creates a MIT10 subcommittee as needed  
(Note: The Alumni Association defines those who received their undergraduate degrees within the last ten years and graduate degrees within the last five years as young alumni)

### **Club Counsel**

- Designated member of the Club Board who is a lawyer and who has agreed to render occasional legal advice to the Board as needed.

### **COMMITTEES**

One of the most important functions of a Club is to recruit more alumni to volunteer for active roles, and committees are a means to accomplish this. Committees should be chaired by officers or board members as noted above. Standard committees include:

#### **Program Committee**

- Develop program ideas for Club events, and plan logistics

#### **Membership Committee**

- Develop and implement strategies to increase Club membership

#### **Communications Committee**

- Develop and implement policies for all Club communication pieces
- Oversee writing, editing and proofing of Club newsletters where applicable
- Oversee newsletter production
- Establish and maintain Club web page
- Maintain and monitor Club e-mail list

#### **Nominating Committee**

- Nominate both new and continuing members of the board annually
- Regularly address the volunteer recruitment needs of the Club
- Convene two months prior to elections

### **ANNUAL GOAL SETTING FOR CLUBS**

The governing body of the Club should have an annual meeting to set annual goals by which you govern the Club on a day-to-day basis. Without clearly defined, S.M.A.R.T. (Specific, Measurable, Attainable, Realistic, and Time-based goals), your Club will struggle to determine priorities, set budgets, and carry out activities. In addition, the measurement of goal achievement helps to provide a history of the Club's most significant objectives—the recruitment of volunteers, scheduling of events and programs and the recruitment of dues-paying members.

Volunteers are the backbone of your Club. You must have adequate volunteers to carry out Club activities and events as well as general organizational duties, such as membership development, budget and finance and communications. By developing a structure with deep resources at the committee level, you can provide a natural pipeline of volunteers to bring up the leadership ladder.

Without a goal for the number of events and types of events your Club will hold, varying Club leaders may compete for budget resources and/or key event dates. Everyone must be clear on the primary event objectives and strategies, and the leader of the program area (usually VP of Programs) must be the clearinghouse for event scheduling. An ideal way to determine how many events you wish to plan is to break down your list of past events first by type of event. For example, if last year your Club held one alumni seminar, two sporting events, three cultural events, and five MIT10 events, it would be best to consider these categories for the present year. By breaking your events down into categorical goals, you will also have a good starting place for determining your volunteer needs.

A membership goal should be based upon the market penetration percentage of the local alumni population. A 10% market penetration is suggested. Therefore, an area with 1,000 alumni should plan to have 100 dues-paying members. When setting a membership goal, you must determine a reasonable dues amount for your area that will in turn support the budget of your Club and the basic costs of membership (newsletter, mailings etc). You must also determine the number of members there have been in the past, preferably examining the last five years membership history. Consider setting a multiple year goal in the area. For example 10% of your local population is 100 alumni, but over the last five years, your Club has not had more than 45 members annually. It may be unrealistic to plan to achieve a goal of 100 members this year, but by planning over the next three years, with membership goals of 65, 85, and 100 respectively, you develop a reasonable objective.

## C. Club Finances/Insurance/Legal Matters

### CLUB FINANCES

Neither the Association nor MIT provide Clubs with any direct financial assistance. It is imperative for all Clubs to be self-sustaining and to establish some mechanism to obtain revenues for its overall maintenance. The first source of income for Clubs is membership dues. (Refer Section F for strategies on obtaining membership.) Other potential sources of income for Clubs include:

- Profits from events
- Event sponsorship
- Income from Club funds kept in savings accounts or money market funds

Clubs that accumulate large reserves are encouraged to explore different ways to spend some resources without putting the treasury into a precarious position. Some possibilities to consider:

- A Club scholarship program for current MIT students from the Club area
- An additional visit from a member of the MIT faculty
- A reception to welcome new alumni to the Club area
- A reception to welcome newly admitted students

The stewardship of a Club's finances is an important matter that requires a reporting mechanism to both the Club's Board as well as to the Association. The Board should receive a written report from the Treasurer at each Board meeting. Separately incorporated 501 (c) (3) Clubs are responsible for filing the proper State, Federal, and IRS forms, and must provide the Association with a copy.

### TAX EXEMPT STATUS

MIT Clubs can choose to use the Institute's 501 (c) (3) status thereby entitling them to be exempted from Federal taxes on interest bearing accounts. We recommend Clubs use the Institute's tax exempt status.

For those Clubs that elect to use the Institute's tax-exempt number on their income-producing assets, there is an obligation to report all income received to the Association. At the end of each fiscal year, the Club President, with the Treasurer's assistance, must send to the appropriate AAO a report of all Club income for the year. For particular state exemptions for Club purchases, facility rental, catering etc., the Club must obtain its own state tax-exempt number.

Some major MIT Clubs in areas with large alumni populations have incorporated and obtained tax-exempt status in accordance with the 501 (c)(3) regulations. There is little reason for typical MIT Clubs to do so. A separately incorporated Club would use its own tax-exempt number for business transactions on behalf of the Club.

Be sure to consult your AAO if you have further questions on these issues.

### CLUBS AND THE IRS

#### Membership Dues

Clubs qualify as charitable organizations either under the Institute's or their own separately incorporated 501 (c) (3) number. The IRS has ruled that membership fees paid to a qualified charitable organization are deductible as charitable contributions to the extent that such payments exceed the monetary value of the benefits and privileges available by reason of such payments. (Basic dues generally do not exceed the value received, and are therefore not deductible).

## **Donations**

The IRS requires charitable organizations to inform donors of the value of any quid pro quo gifts. Quid pro quo gifts are defined as gifts resulting in benefits received by a donor in return for a charitable contribution. Any charitable organization soliciting quid pro quo contributions in excess of \$75 must provide a written statement that informs the donor of the amount of the payment that is deductible and gives a good faith estimate of the value of the quid pro quo.

While most Clubs' dues are less than \$75, there are some situations where gifts of \$75 will be needed. In such cases, we suggest the following language: "An MIT alumnus/a may deduct as a charitable contribution Club dues paid in excess of the value of services or material goods provided by the Club".

## **INSURANCE COVERAGE**

All MIT Clubs have insurance protection under the umbrella policy held by the Institute. This applies to both separately incorporated Clubs and those that are not. The insurance provides coverage in the event that mishap at an officially advertised Club-sponsored event gives rise to a claim.

If you are a separately incorporated Club, please notify your Alumni Affairs Officer in writing if you wish to take advantage of MIT's coverage.

To take the fullest advantage of this service, the following guidelines should be observed:

- Do not allow volunteers to serve alcoholic beverages at an event. This should be done by an establishment that has a liquor license and carries host liquor liability coverage (restaurant, hotels, professional caterers).
- Be aware that if your Club hosts an event in someone's home or private property, the property owner's insurance will be the primary object of any possible claim, and MIT's coverage will be excess only.

A copy of the waiver form and insurance summary is in this manual's appendix as well as on-line at <http://alum.mit.edu/clubs/toolkit/reporting/index.html>

## **BANK ACCOUNTS FOR CLUBS TREASURERS**

All non-incorporated Clubs are subsidiaries of the MIT Alumni Association. Please ask your AAO for the Institute's Tax ID number when you open a bank account. Any interest income on the account is reported to the IRS under that number.

Both the Club and the Association must exercise due diligence and establish one of the staff of the Association as an authorized signer on the account, especially when the Institute's TIN is used. This is in case the primary user becomes unable to manage the account, or does not handle the account responsibly. The Association must be able to access the account on behalf of the affiliate group as a whole.

These are the steps to follow to establish an account:

Get all the application paperwork from the bank chosen and complete it as much as possible.

- The Account Title should be MIT Alumni Association - Club/Organization's name.
- Our Business Type is Unincorporated Association. We are a non-profit 501 (c)(3).

Forward the paperwork to your AAO who will make sure that the rest of the application is complete, including the Institute TIN, and have the Association's authorized signer (generally the Association Executive Vice President and CEO) sign in all the right places.

### **BULK MAIL PERMITS FOR CLUBS**

As a subsidiary of the Association your Club is authorized to carry out mailings for Club activities under the auspices of the Association. To apply for your Club's bulk mail permit you will need to produce the following documentation for the United States Postal Service. This process will take up to 10 business days.

- A signed letter sent from the Association Executive Vice President and CEO stating that the Club is a subsidiary of the Association.
- Copy of the Institute's tax-exemptions letter from the Internal Revenue Service showing our 501 (c) (3) status and the Federal Tax ID number
- Copy of the Association Constitution
- Copy of the Association bylaws
- And a copy of the United States Postal Service PS form 3628, October 1996

The local postmaster will complete the PS Form 3628 with local permit information, then file the documents with the USPS Non Profit Center, PO Box 3628, Memphis TN 38173-0623. The USPS Non-Profit Center will contact the local postmaster with your mailing permit in 10 business days.

Note: This does not apply to Clubs with a separate 501(c)(3) tax incorporation or International Clubs.

## D. Volunteer Development

The key to a successful volunteer organization is leadership renewal. Few people want to lead a Club for a long period of time. Most however, will volunteer for a role if the position has defined term limits.

### RECRUITMENT

Clubs should always be on the lookout for potential volunteers and must have a pool of helpers who are learning and becoming involved as they help. Cycle these helpers into appropriate leadership roles and keep your pool refreshed by following the suggestions below:

- Send a prompt welcome note to those who are listed in the monthly New Neighbors reports. Pay particular attention to those who have volunteered for other Clubs
- Ask your Alumni Affairs Officer (AAO) for lists of alumni who have a history volunteering for other MIT programs
- Periodically ask your AAO to provide you with lists of past event participants to identify frequent attendees to cultivate for future volunteer opportunities
- Keep job descriptions current for Club positions including tasks and time involvement
- Include a volunteer sign up line on all electronic or postal mailings
- Distribute handouts at all events, inviting members to indicate interest, suggest program ideas, and update their addresses
- Post your open positions on the Association's Volunteer Opportunities Bulletin Board <https://alum.mit.edu/ecommerce/ListModeratedPost.dyn?id=VolunteerJob&formId=20>
- Use SmarTrans™ to collect names of all event attendees including free events
- Send your AAO names of walk-in attendees that were not captured on SmarTrans™
- Use a committee to welcome first time attendees to all events
- Use identifiable ribbons or different colored dots on first time attendees name badges

### Job Descriptions

All volunteer positions should have job descriptions. They should be current, clear and thorough, and include a sense of time involvement to define the extent of the commitment needed. Sample volunteer job descriptions are provided in the Appendix.

### Board Training

The Association offers board trainings for Club officers and board members annually, or bi-annually where Clubs have two-year officer terms. These trainings focus on Club Best Practices highlighting what works for other Clubs and demonstrate some of the volunteer tools that can assist Clubs to be self-sufficient and successful. Ask your AAO for further information and schedule a training session.

### Alumni Leadership Conference

The Alumni Leadership Conference (ALC) at MIT takes place every year in the Fall. ALC brings together a select group of volunteers to learn from each other's efforts. Your volunteer experiences provide grounds for discussions of new approaches to strengthen volunteer connections to the Institute and to one another. ALC events include practical workshops, stimulating panel discussions, and lively networking events designed to help you in your volunteer activities for MIT.

### RETENTION

The President or President-Elect's chief responsibility should be volunteer management. Keeping track of volunteers should enable Clubs to know where extra help is needed. Sharing the workload makes the volunteer feel supported and appreciated. Emphasizing training, supportive efforts, and teamwork, and keeping your pool of helpers refreshed helps you and your volunteers from getting burned out. If done

correctly and consistently, the volunteers will have the motivation and ability to do their jobs, the Club will function well as a whole, and everyone will share in its success.

## **RECOGNITION**

We can't emphasize enough the importance of thanking your volunteers in a timely and appropriate manner. A sincere, public thank you at a Club event is important to those who worked behind the scenes to put the event together. Not only does it thank people for a job well done, it also gives potential planners an incentive to volunteer to organize an event the next time around. You may choose to hold a thank you reception or picnic for all volunteers at the end of the year. An MIT memento serves as a special thank you for a larger effort and the Association can provide certificate of appreciation templates for your use.

The Association established the Volunteer Honor Roll to recognize in the current year individual extraordinary performances by volunteers at the local level. Alumni, parents, widows, spouses, faculty and students are eligible. We urge you to nominate an outstanding volunteer for his or her efforts this year. <http://alum.mit.edu/gv/volunteer/recognition/vhr.html>

There are also a range of Association awards, for which nominations can be made through your AAO. These are considered during the winter by the Awards Committee, and are presented at ALC. Annually, Club Presidents receive information about the awards as well as nominations for Association officers. All Clubs are strongly urged to send in recommendations and nominations.

## **SUCCESSION MANAGEMENT**

For the long-term health of your Club, it is vital that your Club's leadership pay significant attention to succession management. All too often, Association staff get the springtime call from a Club with the outgoing President saying "I cannot be President anymore, but there isn't anyone to take my place." Adequate succession management planning on an ongoing basis will help to overcome such a situation.

As indicated earlier in this section, volunteer management should be the primary responsibility of the President and the President-elect. Often the President-elect will chair the Nominating Committee, which should be a year-round, standing committee of the Club always on the lookout for new volunteer potential.

Establishing a Club structure that builds levels for new volunteer development and training is important. Many boards falter in leadership succession when the Club relies on just a few key officers to get all the work done. Building a variety of committees, with both short-term assignments and longer term leadership positions, will help to establish a pipeline for future leaders. Even in the smallest Clubs for example, the VP of Programs should not take it upon him/herself to organize each event, but should instead delegate some of the work to willing volunteers, provide training, and communicate to other Club leaders about jobs well done. Keep records of your volunteers, their interests, the activities they carried out, and basic contact information. Use the Association Annual Report as a guideline and keep your AAO informed of all your volunteers.

Discussing succession with volunteers on a regular basis is also important. Planning with a volunteer how he/she wishes to move up the Club's leadership ladder—from a committee member, to committee chair, to Vice President, etc—is a useful way to help the volunteer better understand the Club structure and the opportunities available to him/her. In addition, you can consult with your AAO to help volunteers and leaders plan for further succession onto Association Boards and committees, Club leadership and the MIT Corporation. Showing volunteers future opportunities can help enhance the appeal of current volunteer jobs.

## E. Online Services for Clubs

### **SMARTRANS™**

SmarTrans™ is an Alumni Association web-based application in the Infinite Connection that allows your Club to collect credit card payments for dues and events. The application communicates with the Association database, which makes record keeping easier and more efficient. It consolidates Club records into one accessible database, make year-end reporting and tax filings easier, and get feedback and information for and about your members. Your Club can collect registrations for a simple no-fee event or register attendees for a complex multi-day conference or series.

Your Club membership history is uploaded into the application to allow for pre-population of Dues records. If your Club has provided membership information to the Association office, records for your members will include the historic information along with transactions completed through SmarTrans™.

Authorized Club officers can access the SmarTrans™ system. To be an authorized officer you must:

- have an Infinite Connection account
- hold an office with your Club
- be coded in the Association database as an officer
- participate in a SmarTrans™ training session

The live SmarTrans™ application can be accessed from the following URL on the Association web site: <http://alum.mit.edu/groups/toolkit/> or <https://alum.mit.edu/smarTrans/user/Home.dyn>

Clubs do not have access to SmarTrans™ until the Association has “turned on” the group and loaded historical data. If you are coded correctly on the Association database as a Club officer, SmarTrans™ will recognize you as such and will take you directly to your group's screen.

### **Dues Management**

SmarTrans™ allows you to collect online credit card payments for dues. The database for your group includes all Dues history previously reported to the Association, so if this information has been kept current, SmarTrans™ will provide you with a membership snapshot of any of your members. Each time you create a Dues payment form, it will be added to a web page for Dues collection for your group. You may insert the URL for this page into a "pay now" page on your group's website or send the link out in a broadcast email during your group's membership drive.

Your SmarTrans™ membership dues form will also provide an option to encourage mailed in application forms for those who are uncomfortable paying online. In these case, the Club needs to send the Association all the necessary information (i.e name, address changes, Dues type, term and amount) to be entered in manually so your membership data is accurate.

SmarTrans™ also provides Clubs a convenient way to renew membership dues. In three easy steps, you can send an email to all members whose dues are either expiring or have lapsed offering a convenient way to renew their membership.

### **Events Management**

SmarTrans™ allows you to collect online credit card payments and registrations for events. By creating an event, you will be creating an online registration form which can be added as a link on your group's website or sent in a broadcast email to your membership.

If you have members who are uncomfortable paying online and would prefer to send a check or credit card by mail, SmarTrans™ enables your event planner to manually enter these registrations in and process credit card and checks. This step is very important in maintaining your event data accurate.

The Association sends your Club Treasurer a check every 15 days from when it started taking credit card transactions. Direct electronic deposit is also available. Contact your AAO if you wish to take advantage of this service.

### **Survey Questions**

Along with registrations, the SmarTrans™ event template includes a survey function through which you can collect feedback and preference data from your participants. Survey Questions may be added to the Dues and/or Events registration form for a user group to allow Clubs to collect feedback on member preferences and interests.

Please refer to the SmarTrans™ guide available on <http://alum.mit.edu/groups/toolkit> for more detailed information.

### **ALUMNI SITE BUILDER™**

Alumni Site Builder™ (ASB) is an Association built web-based application in the Infinite Connection that automates the time-consuming and often complicated task of Website management for alumni volunteers. The application allows Clubs to maintain a robust web presence including photos, images, and downloadable documents without the need for HTML programming. A guide is provided as a downloadable PDF document from [https://alum.mit.edu/docs/ccg/clubs/asb\\_leaders\\_guide.pdf](https://alum.mit.edu/docs/ccg/clubs/asb_leaders_guide.pdf).

Volunteers who are interested in developing Web pages for their Club using ASB must contact your AAO who will then submit your name(s) to the Association Online Services group for the necessary training process. A staff member from the Online Services group will contact you with a schedule of upcoming ASB trainings for you to join. All trainings are conducted via a Web conferencing service requiring basic online PC computer access. All necessary log in information will be sent to you prior to the training.

### **Access Rights**

There are two levels of access rights for volunteers in Alumni Site Builder™. When setting up your site, the Association staff person working with you will need to know which group officers should have what rights:

**Edit Privileges**—Any officer in the group may be granted access to create and edit any or all of the five sections of the Website.

**All Privileges**—Webmasters or other officers designated by the group may be granted Publish privileges for any new or edited item within the Website.

### **Alumni Site Builder Templates**

ASB offers templates for five sections in which to place content for your Website. A six-step Site Set Up Wizard is available to help officers with Publish privileges have access to the Wizard.

**Home**—A place to highlight information about your group and spotlight timely information. Placeholder texts are included in the Templates to get you started and give a sense of the type of content frequently found on alumni group sites.

About—Includes a list of your officers and, in club and group sites only, a section on volunteering. The About section can be used to describe the history of your group, your goals, and details about key volunteers and officers. This section is divided into three sections.

- Introduction (consider this the "About Us" section). This descriptive paragraph will always remain at the top of the Introduction page, with additional items added below;
- Officers - this section is a list of officer roles for your group with the names of each volunteer listed as a hyperlink. The hyperlinked names take anyone interested in finding out more about the officer to the individual's record in the Online Alumni Directory. This allows you to provide contact information for your officers without having it be public (and available to spammers). Login to the Infinite Connection is required to access alumni records. Information on this page is database-driven and will display officer names provided by your group to Alumni Association staff; and
- Volunteering (not available for Class and FSILG Websites) - this section should include such topics as volunteer "stories," open volunteer positions, information about how to volunteer, and resource materials for volunteers.

Membership—This section can be used to indicate dues information and membership levels or by promoting a Club scholarship fund. It can include a link to your SmarTrans™ dues collection form.

News—The News section is a place to include stories about the group that aren't related to upcoming events for which you have listings in the Events section. Suggestions could be: stories about interesting alumni, updates on giving, a progress report on a scholarship recipient, and a recap of a past event or board meeting. This section has the capability to hold 10 photos in a Photo Album.

Events—The Events section works similarly to About: Introduction and Join In/Membership in that it includes an introductory descriptive paragraph that will remain at the top of the page, no matter what items are added. This paragraph should describe the type of events your group holds, a person to contact if someone wants to initiate planning an event, or any information you want the public to know in the instance that there are no current event listings.

The Events section is integrated with both the SmarTrans™ application and the Association Events Calendar. The main Events page will include a fixed paragraph of description at the top of the page. The heading for this event is a hyperlink to the Event Detail page. This page will include the photo and long description of the event, plus contact information for the event planner, location, time and a related document, if uploaded. Any event added via the Add Event function will automatically populate the MIT Alumni Association Events Calendar (<http://alum.mit.edu/ne/calendar/Index.dyn>). If you do not wish an item to appear in this calendar, send an email to [alumcalendar@mit.edu](mailto:alumcalendar@mit.edu).

If your group is using SmarTrans™, events from that application are automatically linked to Alumni Site Builder™.

## **LISTS AND LABELS ELECTRONIC DOWNLOADS**

Club volunteers can download names and contact information of all alumni associated with your Club area through the Infinite Connection. [alum.mit.edu/Clubs/toolkit/resources/](http://alum.mit.edu/Clubs/toolkit/resources/) You must be coded an active volunteer to be able to access this service.

### Data Disclaimer

**All information contained in the Alumni/ae Association alumni database is the property of the Alumni/ae Association and is used only for authorized Alumni/ae Association purposes. Lists and labels of selected groups of alumni and alumnae are made available through Alumni/ae Activities staff to alumni and to Institute offices who request these lists and labels for purposes which benefit MIT. Information about MIT alumni and alumnae is NEVER made available for non-MIT purposes or for use by organizations not affiliated with MIT. There are two basic principles at work here: first, the protection of the individual's contact information and use of their information according to any of their express written wishes; second, the beneficial use of the information for MIT. In all such cases these decisions must be made with the concurrence of an Association staff member (the contact person).**

## F. Club Membership

### CLUB DUES

Club membership dues provide Clubs with much needed funds. When planning your membership goals, it is important to remember that one of the primary goals of the Association is to provide ways for alumni to connect with each other. Recognizing that only a minority of alumni (usually less than 25%) will actually become dues-paying members, access to the Club information about Club activities should not be limited to them.

**When developing a policy for annual membership dues, factors to consider include the costs of:**

- Printing and posting communication pieces
- Complimentary dinners and tokens of appreciation for guest speakers
- Occasional underwriting of partial or entire event costs
- Audio/visual equipment rental
- Local Club programs for student scholarships or financial aid

**Membership Dues should be:**

- Solicited of all local alumni annually at the beginning of the fiscal year
- Offered on a sliding scale (e.g., lower dues for new alumni)
- Ideally coincide with MIT's fiscal year of July 1 through June 30 of succeeding year

In addition, higher membership categories, such as "supporting" and/or "sustaining" may be added to allow people to make larger contributions.

### Suggested Types of Membership

- Complimentary. Free membership usually offered to the most recent graduates (one year out, for both graduates and undergraduates).
- Young Alumni. Discounted membership offered to the five most recently graduated classes. Many Clubs charge just \$15 and some deduct 50% from the regular membership.
- Regular. Most popular type of membership offered. Most Clubs average \$25 to \$35.
- Supporting. Membership that contributes to overhead cost of Clubs above and beyond dues. Usually \$75.
- Sustaining. Same as above, Usually \$100 to \$250.

### MEMBERSHIP RECRUITMENT

As most Clubs are operating on the Association's fiscal year (July 1 to June 30), spring is a good time to think about membership recruitment. The Association recommends a dues-paying membership base that equals ten percent of the local alumni population. Below we have outlined some suggestions for an effective membership drive. Should you need assistance in developing a membership recruitment plan for your Club, please contact your AAO.

- Post your Dues on SmarTrans™.
- Send a stand alone "acquisition" membership mailing to all alumni in your geographic area who are not current members. Ask your AAO for samples from other Clubs.
- Include in all your communications a link to your membership form or a pre-printed form to allow alumni to sign up for membership.
- On event announcements, be sure to show non-member and member price difference to encourage alumni to become Clubs members.
- New graduates in your area should receive their first invitation to join the Club sometime in September, if not earlier. It is strongly suggested that new grads receive a heavily reduced or free membership.

- Consider a summer telethon to encourage both lapsed members and non-members to sign up.
- Consider sending your September newsletter to lapsed members with a membership form insert.
- As often as possible, reserve certain Club benefits for your dues-paying members. If you offer too many benefits to non-members on a regular basis (items such as your Club newsletter, email listserv, or having similar pricing for events for members and non-members), you may inadvertently remove the value of being a Club member. Look for ways to add value to your membership, such as providing a local alumni directory to members only, having some events for members exclusively, or offer an event that is free to members, but has a cost to non-members.
- Personally contact the alumni new to your area provided in the monthly New Neighbors reports from the Association.
- SmarTrans™ offers Clubs the ability to send an email to members whose dues are expiring at the end of the fiscal year and to those who were once members but have let their membership lapse (lapsed members) so long as they are still living within the Club area and have an email address. This message includes a link for online membership renewal or instructions for those who prefer to mail in a check or credit card number.

### **New Neighbors Reports**

Every month, three electronic reports are emailed to Club Presidents listing alumni who have recently moved into and within your Club area. This is a group that you should welcome and solicit for membership. The three reports are detailed below.

- **Clubname\_New\_Neighbors**
- **Clubname\_New\_Neighbors\_Committee.**
- **Clubname\_New\_Neighbors\_address\_updates**

### **REASONS TO JOIN AN MIT CLUB**

People join MIT Clubs for many individual reasons. Highlight the perks of Club membership in your mailings and at events. Club members, through their involvement, will:

- receive discounts to appealing events
- have a chance to support MIT financially and through their efforts as volunteers
- meet new friends and renew old friendships
- hear first-hand new topics about the Institute from MIT faculty and staff
- provide scholarship money for future MIT students
- keep in touch with MIT
- provide social, educational, cultural, civic and community service events or activities
- enjoy behind-the-scenes tours at local sites
- receive exclusive invitations to special MIT events

### **KEEP TRACK OF YOUR MEMBERS**

- If you use SmarTrans™ for your Events registration and Membership Dues payment, the Association will capture your members' and non-members' attendance at events. Please remember to send your AAO the names of participants who registered on site (walk-ins) and a list of dues-paying members who pay directly to the officers by check.
- Check Lists and Labels on the Volunteer Toolkit to get a list of your members and advise your AAO of any discrepancies.
- Ask for a list of non-renewing members to target with a special letter or phone call.
- Ask for a list of members who did not attend any event, thank them for their support, and ask why they didn't participate.

## **LOOK FOR TRENDS**

Are most of your members about the same age or in the same profession? Do your events attract the same people? For example, if you have low representation among young alumni, try to recruit a young alumnus/a to join the board and to plan an event geared toward young alumni. If you have a decrease in the number of membership renewals, have a few board members telephone these alumni to find out the reasons behind their decisions.

## **TARGET GROUPS**

An effective way to keep your members interested and active is to provide special interest programming. Some ideas include: MIT10 events, business luncheons, career forums, parents' events, family events, get-togethers for older alumni, etc. If these groups are big enough among your membership, you may want to have a chair on your board assigned to each group.

## **THE PERSONAL TOUCH**

Many Clubs have reported terrific results from phone campaigns – both to increase attendance at events and for membership recruitment. Another benefit of phone calling is that you can use it as an opportunity to gather some feedback at the same time!

## **INCENTIVES TO BE RESERVED FOR MEMBERS ONLY**

- Printed Club Directories
- Newsletters
- Special Discounts for Club Events (25% discount is recommended)
- Pre event reception for faculty visits

## **RECOMMENDATIONS TO INCREASE MIT10 INVOLVEMENT WITH CLUBS**

The Association defines MIT10 as those who received their undergraduate degree in the last ten years or a graduate degree in the last five years.

- Appoint a MIT10 Chair
- Plan an annual event to welcome new graduates to your Club at minimal or no cost.
- Provide samples of easy, low-cost MIT10 events that Clubs can sponsor. Topics such as financial planning, help on buying a house, resume writing, and networking are the most interesting to this population. Simple social gatherings such as happy hours or bowling could be considered.
- Offer a small gift to MIT10 who come to a Club event for the first time.
- Create a standard survey that Clubs can use to poll their MIT10 constituency and plan events that are best suited to their purposes.

### **The most successful activities for MIT10 are:**

- Happy hour (or other purely social event)
- Events combined with MIT10 from other universities
- Networking or other career development events
- Sport events and outings (hiking, biking, etc.)
- Events related to current hot topics in science, technology, or business

### **The most effective ways to get MIT10 to attend Club events:**

- **LOW COST!**
- Eye-catching invites with lighthearted graphics
- Event coordinator is also a young alumnus/a
- Email communications for events
- Personal contact with MIT10 before events (e.g. phone calls)
- Less formal agenda
- Follow-up after events
- Newsletter that includes MIT10 information

## G. Club Program and Events

Plan an annual program planning event in late spring to brainstorm ideas for the next fiscal year. Such a plan serves to focus energy of the volunteers on thoughtful planning and thorough execution, and minimizes the chance for less popular or ill-prepared events that can cause volunteer “burnout.” Publicize this event broadly using your newsletter, email list, web site and phone calls. Keep the following suggestions in mind when planning this event.

- Find a location that is friendly, convenient to get to
- Offer light refreshments (i.e., pizza, sandwiches and beverages)
- Encourage all to play a role in an event or program. Include a list of previously planned events
- Build excitement with prizes for ideas or willingness to help with an event
- Keep an eye out for newcomers and make them feel welcomed.
- Keep an open mind for new ideas
- Prepare handouts with planning notes and job descriptions
- Emphasize team work so events don't look too overwhelming to plan
- Identify a chair or co-chairs for each event, and team experienced volunteers with the less experienced.

### WHEN PLANNING CLUB ACTIVITIES AND EVENTS

MIT Club events provide opportunities for MIT alumni, their friends and families to connect with each other, learn about interesting subjects, and show support of the Institute. Successful Club events will reflect the interests of Club constituents (members and/or all alumni in the area); the general character of the Club's surrounding city or geographic area, and the careers of Club members. Here are some tips to remember when planning your events:

- Establish purpose and goal of program
- Provide an equal proportion or combination of social, educational, civic, professional, cultural, newly admitted students, family, young alumni, and MIT-affiliated events
- Make sure that you provide top quality events instead of many events.
- Analyze the best time of year, time and day of week, and location of events. Rotate events to different parts of your Club area
- Study your membership interests and demographics of your alumni at large. Offer programs your membership is interested in
- Research local community events and activities to sponsor
- Review the strengths and weaknesses of previous year's programs

Remember MIT traditional events such as the summer picnic event for students including the incoming freshman class, holiday gathering, faculty event with admitted students, etc.

Inform your Club constituents about your upcoming schedule of events. You don't need to lock in the specific dates but a general idea of the time of year or month would suffice. Post it on your website, announce it in your newsletter and send it out on your listserv. An annual schedule of events provides a coordinated schedule that shows a wide and balanced variety of events. It also alerts the Club's constituency to the overall schedule, allows for long-range planning, and provides incentive for alumni not only to become interested and active in the Club's annual activities, but excited to become members!

## EVENT PLANNING TIPS

**Decide on the date, time, place and price of your event early**—Depending on the event, two to four months would not be unusual. Sometimes it takes longer find an appropriate and available location. Please allow enough time for marketing and publicize your event at least twice. Consider carefully event costs and establish appropriate pricing. (see Pricing Guidelines, for additional help). If your event involves a speaker, send your request to the Association Alumni Education group (see Appendix for list of Association staff) no later than three months prior to the desired date.

**Publicize it**—Whatever purpose or goal you set for your event, it is important that it reaches maximum participation and breaks even. Here are some suggestions on how to market your event.

- Send an email Save the Date immediately to the Club area's email list
- Regularly Update your website as details get confirmed
- Depending on the nature of the event, consider inviting other university/college Clubs or the local community
- If your speaker is a recognized leader in his/her field or is involved in a current topic of national or world importance, send notice of the event to the local papers
- Always include your speaker's biographical details and picture in your notices and announcements.
- Arrange for press coverage at the event

**Determine the type of event announcement to send**—There are various options for you to consider depending on the budget and the scope of the event.

- Self-Mailer with a Reply Card
- Regular Sized Postcard
- Large Postcard
- Regular Invitation with RSVP card and return envelope

Figure out how much each of the options would cost to design and print. Don't forget to include the cost of postage. First class postage gets your mailing to the recipients sooner but non profit bulk rate is cheaper. Are you mailing to the whole population or do you want to mail to a selected population only (I.e. members only)? Do you want to mail to only those who do not have email addresses? Use the "Lists and Labels" service on the Infinite Connection to get contact information for all alumni in your area or ask your AAO to obtain them for you.

**Establish a back-planning calendar**—Begin from the date of the event and reverse it chronologically. Allocate the appropriate amount of time for each step. Sticking to the deadline will keep you from being overwhelmed at the last minute and allow you time to actually enjoy the experience. A sample is provided below.

Date of Event	
Final count due to venue	3-5 days prior to event date
RSVP deadline	5-7 days prior to final count due date
Reminder email for RSVPs	7 days prior to RSVP deadline
Invitation Receipt Date	4 weeks prior to RSVP deadline
Mail date (first class)	1 week prior desired receipt date to alumni
Mail date (non profit, bulk rate)	2 weeks prior to desired receipt date
Printing/mailing	1 week prior to mailing
Information gathering ( <i>speaker and location selection/negotiations, draft notice</i> )	1-2 weeks prior to date to the printer

In summary allow yourself 10-14 weeks prior to event date to do all the necessary steps for a successful event.

### **CREATING YOUR EVENT ANNOUNCEMENT**

The most important thing to remember about your event announcement is that it should be used to sell your event! Make it attractive so people are inclined to open it. This is your only chance to make your event attractive to prospective attendees. Be creative but keep it simple and easy to read. Be careful about using too many fonts and graphics that distract the interest of the recipient from the purpose of the mailing.

Stress the event's benefits. Is it educational, informational and/or thought-provoking? Is it purely a chance to meet and mingle with other MIT-affiliated people? If the location is of special significance locally and or nationally, use that as an added attraction. Think of your audience—why would the event be of interest to a young or a more senior alum? Is the event aimed at families or individuals? Is the topic of national or local significance? What about the timing? Is it appropriate for the time of the year, the state of the economy or the world?

The following information should be in EVERY announcement:

**TITLE**—Use a heading that distinguishes this mailing from other mailings

**WHAT**—A short description of the event and its benefits.

**WHERE**—Name and address of the location including specific meeting room if applicable. Directions would be helpful if there is enough space. A web address will also be helpful.

**PRICE**—Always list member and non-member prices. Include pricing for guests of members. See Pricing Guidelines for more information

**RSVP**—Contact information of person taking the RSVPs and deadline for all reservations.

**SMARTRANS LINK**—Encourage pre-registration through SmarTrans™

**COUPON**—When possible, combine the RSVP with a reply coupon requesting dues or include link to your Membership Dues page

**CONTACT FOR FURTHER INFORMATION**—Name and contact information of person who can answer or provide more information regarding event.

**MIT BRANDING**—the downloadable MIT logos, seals and instructions for their use are available on: <http://web.mit.edu/graphicidentity/index.html>

Send your event announcement to the Club newsletter editor and your webmaster to be uploaded onto your web site. Time your web announcement to go live on the same date the printed piece arrives in people's mailboxes. This is especially important in cases where you expect sold-out attendance and events with a maximum number of spaces and registration is accepted on a first come first served basis.

Ask the event contact person, to consider changing his/her personal answering machine greeting to provide an event date or details to minimize the number of returned calls they may have to make. A sample greeting would be: "If you are calling about the MIT event, plenty of room is still available, leave name/phone/address and number of attendees," etc).

You may also wish to have a Club answering machine that gives up-to-date information about Club events and record reservations.

### **LOCATION**

Be creative when selecting a location for your event. Consider using a location that is not typically accessible to the general public. People enjoy going somewhere they haven't been before or where they

normally wouldn't or couldn't go on their own. Consider using a facility which already has entertainment or some other value added to it such as a famous winery, museum, aquarium, performing arts facility, or culinary academy. Check to see if any of your members belong to private Clubs or have access through their work to any unique facilities. Take advantage of your nonprofit, educational service group status to open some doors. Keep track of suitable, interesting sites/venues for future use.

Details to inquire about when choosing a location (as appropriate):

- Number of people the facility can accommodate
- Appropriateness of layout for the type of event (i.e. dining area big enough for a sit-down meal, adequate circulation space for a reception, space for chairs for a speaker event, etc)
- Bad weather plan/alternate location
- Rental fee; deposit; always negotiate, some spaces may be donated
- Hours facility is available (including set-up and clean-up)
- Who is responsible for set-up and clean-up
- Adequate area available for registration table and chairs
- Flowers/decorations
- Adequate parking; self or valet parking and charge (possible subsidy)
- Is security needed; charge
- Coat check; charge
- Availability of AV equipment, podium and microphone, piano, dance floor, etc; charge for use
- Special requirements or restrictions, especially regarding food/beverages
- Special fees or additional charges (including tips and taxes)
- Does the location have a liquor license?
- Location and accessibility of bathrooms
- Location of handicap access

For some locations other than hotels, clubs, and restaurants, you may need to bring in equipment such as tables, chairs, canopies, and garbage cans, as well as arrange for catering, sound equipment, set-up, and clean-up. Check to see what equipment and services the facility provides and what your group needs to provide.

Be certain to determine all costs involved when using any facility, and ask for written confirmation of all agreements.

If the event involves a speaker or speaking program, ensure that the room is private and away from outside noise.

### **PRICING GUIDELINES**

The primary objective of an event is to provide the Club members with an enjoyable and valuable experience. Ideally, however, events should generate some surplus to help defray mailing costs and other expenses, planned and unplanned. A well-planned event should never show a loss unless they are unique circumstances (i.e. unusually stormy weather). When setting the price for an event, develop a rough budget of expected income and expenses (See the following Event Budget worksheet). This is the best way to get a handle on pricing.

Here are some additional hints and guidelines:

- Estimate expected attendance. Determine if the event should be run to generate a surplus or if it should be subsidized. Since it is difficult to predict turnout for specific event, plan your event so all costs can be adjusted to match actual turnout.
- Beware of large fixed costs (i.e. renting a room, etc) and be wary of signing binding contracts. Look for a corporate or public facility that does not cost you anything.
- Include cost room rental, cleanup fees, copies, postage, or speaker gift.
- Food is essential to the success of some events. However, there have been many successful events without food. Consider hors d'oeuvres, or dessert and coffee, instead of a full-service meal.
- Charge a significant price differential for non-members—in the 25-50% or \$5-10 range depending on the event cost and type. If members pay \$10, non-members should pay 12:50-\$15.00. There are, of course, obvious exceptions to this rule. For a symphony event where the basic cost is \$45 a person, it wouldn't be prudent to charge non-members an additional \$20. The maximum differential for non-members should be about \$10. Guests should pay the same as their hosts.
- Remember that you are providing something of real value to the attendees. Some Clubs set a minimum price of \$5 or \$10—a way to turn a no or low-cost event into a “money-maker” to help subsidize other events. Even free events have a mailing cost. A minimum price also adds perceived value to the event.

### **CATERING AND BAR SERVICE**

Contact the catering manager of the facility or, if there is none, several independent caterers to obtain menus and prices. To develop a cost proposal for an event, the caterer will need to know the approximate number of attendees and the type of service (hors d'oeuvres, buffet, etc) you have in mind. Remember that tax and a tip or service charge is usually added to the listed price of the food. (Often this will add 20% to your bill).

A caterer typically requires an updated attendance estimate a week to two weeks before the event to order food. The final guaranteed number is usually required 48 to 72 hours before the event; however, this may vary and you should discuss this with your caterer. Generally, a 5% leeway is allowed for the guarantee; again, this can vary and should be confirmed with the caterer.

Be sure to determine all costs, including tax and tip, service, linen and china charges. **Get a final detailed agreement in writing.**

### **FOOD CHOICES**

**Hors d'oeuvres** are a good choice if you want a simple reception style of event. It is also the best option if you want attendees to network with each other. Sometimes, it is the only option if the facility cannot accommodate your group for a sit-down meal. Hors d'oeuvres can be less expensive than buffets or sit-down meals; however, depending on the type, variety and quantity you choose, the cost of hors d'oeuvres can often cost as much as a seated meal. It is best to arrange for periodic or continuous serving to keep the selection consistent as well as to accommodate late arrivals.

**Buffets** allow for more mixing than a sit down meal, but less than hors d'oeuvres receptions. Buffets involve some time standing in line; therefore make sure that there is an adequate number of serving stations so your group will not have to wait long. If a selection on the buffet requires a knife, you'll need to provide tables for the participants.

**A sit down meal** is typically the most expensive catering option. It involves a minimum of an hour to complete (including coffee and dessert). Be sure that enough servers will be on hand to provide quality,

timely service. Estimate 20 minutes to serve and consume one course. For an event with a guest speaker, think of pre-setting the salad and the dessert. This cuts down on the servers coming in and out of the dining area and distracting the program.

### **Bar service**

Decide if beverages/alcohol will be included in the price of the event, or if they will be provided on a no-host basis. We recommend that you offer a no-host (or cash) bar so that alumni who do not drink will not be subsidizing the cost of those who do. Your caterer can recommend the amount of beverages to order for your group.

If your facility has its own bar, you'll need to discuss the logistics with the facility manager. Details you should inquire about include:

- Hours bar service is available (i.e. cocktails before dinner, bar open after dinner charge, etc)
- If the bar is operated with cash or drink tickets; if drink tickets used, does the facility handle sales?
- Price of drinks (including soda, waters, beer, wine and hard liquor)
- Bar minimum
- Bartender charge; cashier charge
- Number of bartenders used
- Bar snacks (peanuts, etc) provided/available for a charge

Be certain to check any local regulations and/or restrictions regarding serving alcohol at off-site locations. Make sure to provide non-alcoholic beverages (coffee for evening events.)

### **MUSIC**

Music can be a nice addition to an event. The type of music might be a pianist, a string quartet, a disc jockey, a square dance caller, a big band orchestra, a rock group, or a jazz band. High school and college music departments are often excellent sources of good affordable music as well as town/city arts councils that may offer contact assistance. Most musicians require an advance deposit and full payment on the day of the performance.

### **MAXIMIZING PARTICIPATION**

Phone calling is the best way to encourage people to attend. Set up a phone tree with members of your Board. Often members just need a little encouragement or a reminder of an upcoming program. You also might consider having one Board member call and invite new members to an event. Depending on the program, consider inviting your local community or other Universities alumni in the area.

What you do at an event can make people want to continue to come to other Club events. Make sure to designate a "hospitality" committee or person to greet new members and introduce them to others at the event to make them feel more welcome. Some groups have a "singles hour" or a "MIT10 hour" during the first hour of an event. This allows this group a chance to mingle and get them to create new friendships and networking contacts.

Keep track of the contact information for everyone who signs up for your event. You might have to contact them in the event of a cancellation or a late change in time or place.

### **DURING THE EVENT**

Have a registration table at the entrance to the event. Have someone welcome attendees as they arrive, ask them to sign in, confirm their payment information if applicable. For walk-ins, make sure to take all of

their contact information. Have membership information/forms available to recruit new members and volunteers. Make sure the event has an MIT feel. Ask your AAO to send you MIT nametags, banners and posters.

Provide nametags. A special colored dot or other mark on the tag can distinguish newcomers to the Club to alert members to make a special effort to make them feel welcome and introduce them around.

If you are hosting a speaker, consider having a headtable speaker and make sure all seats are filled. This table should have a reserved sign on it. Most Club events benefit by having an informal head table with the speaker and several key officers and spouses/guests.

Warmly introduce the speaker/host to the audience before the presentation. Ask the speaker beforehand about items of particular interest he or she would like mentioned. Usually a few highlights from the biography provided by the Association, plus informal comments to relate the speaker or topic to the group are better than an exhaustive narrative or the speaker's history. After the speech, end the event after about 20 minutes of questions and answers, or earlier if questions taper off or the hour is late. Don't embarrass the speaker by making him or her do it. And finally, thank the speaker on behalf of the Club. Most Clubs present a gift or token of appreciation. Introduce Association/MIT staff if they are present and offer them an opportunity to speak.

Take pictures for the newsletter and your website. Send copies to your AAO for possible use on Association publications.

Always publicly acknowledge your volunteers at events. Make sure to prominently publicize future activities.

#### **AFTER THE EVENT**

Enter all walk-ins into your SmarTrans™ registration form or send a final list of attendees to your AAO. Send the Treasurer all of the checks, expense invoices/receipts, and note the following information:

- Name of Event
- Number of attendees
- Total income received
- Number of checks enclosed
- Itemized expenses

Clearly indicate which of the invoices have already been paid and which the Treasurer should pay directly. Do not enclose cash; keep the cash and write a personal check for the amount of cash to the "MIT Club of \_\_\_\_\_." Do NOT offset your out-of-pocket expenses with cash receipts—the Club needs an accurate account/audit trail of income and expenses. Summarize your expense receipts and submit for payment by the Treasurer.

Send follow-up letters of thanks to your guest speaker/host and others. One of your or the Association's future activities may depend upon their goodwill. (See Sample Thank You Letter to Faculty Speakers at the end of this section).

Keep details for your report to the Board meeting and for your debrief with your committee—event name, number of attendees, number of first-time attendees, how the speaker was received what worked, what didn't work, what you might do differently the next time. Providing the leadership with the details as you go will help them to compile data at the end of the year for annual reporting. If your speaker was

facilitated was facilitated by the Alumni Education group, a response to the evaluation form is required. Good, consistent planning and evaluation will result in top-quality, successful events time and time again.

If you are having consistent attendance problems, consider the types and suitability of events you are offering. You might survey your members about their interests. Think again about the activities you are offering. Do they appeal to couples? Do you have lots of families or singles in your group? Are all events held in one part of your area? Are your programs too expensive? Are your invitations arriving three weeks in advance of your programs, so alumni are receiving adequate notice? Brainstorming with your Board might give you new ideas.

### **MIT CLUB PROGRAM IDEAS**

There are many popular programs Clubs sponsor on an annual basis. These programs provide the framework for the Club's vitality and future. Be sure to plan programs that cater to your Club members' interests, backgrounds and your geographic location. Incorporate into your annual program some of the Educational Council and Parent Connector Activities as listed below:

### **CLUBS EDUCATIONAL COUNCIL & PARENT CONNECTOR ACTIVITIES**

**Admitted Student Reception (Spring)**—A local reception for admitted students, best planned for the spring break period, which would ideally bring together admitted students and their parents, current students and their parents, and local alumni. Sites for these events must be set by the end of January each year, as the Educational Council Office sends out an invitation to all admitted students and current students making it known to them that a reception will be held in their hometown.

**Summer Send Off Event (Summer)**—A local event for freshman students, best planned for July or August, which would bring together the new class of undergraduate students and their parents, current students and their parents, and local alumni. Generally, these functions are set in a more casual location, and may be in a picnic or barbeque format. Contact your local Parent Connector to collaborate on this event.

**Holiday Reception (December)**—Held during the December holiday period. Unlike past years, we no longer invite all applicants to these meetings, these meetings are limited to early action admitted students and their parents (along with current students, parents and alumni).

All three Educational Council events have some logistical details in common: set in an easy to access location (a hotel, function site, or corporate conference room, although most Admitted Student Receptions are held at the homes of Educational Counselors), refreshments, a brief program with a speaker, and plenty of opportunity for the admitted or prospective students to meet and talk to current students and alumni.

Clubs must coordinate the admitted student reception, as well as the holiday reception, with the local Educational Council group and/or the Educational Council office. Summer meetings should be coordinated with the Alumni Office and/or in coordination with your local Parent Connector.

If you need additional information about planning an event with the Educational Council, please contact Michelle Tom at 617-252- 1529 or [mtom@mit.edu](mailto:mtom@mit.edu), or contact your AAO.

### **OTHER EVENT SUGGESTIONS**

#### **Continuing Education Programs**

A specific reason some alumni join a local MIT Club is to maintain the intellectual stimulation that they experienced while at MIT. Continuing education programs that include faculty speakers (see Alumni

Education for more information), local alumni corporate leaders or entrepreneurs, or MIT Senior Administrators, are a great way to continue the “drink from the fire hose.” Many Clubs have planned seminar series, plant tours, and expert panel discussions.

### **Arts & Entertainments Events**

Museum tours, theatre performances, concerts, and winery tours are events many Clubs have implemented successfully. Look for group discounted tickets for the local theatre, music or comedy shows. Museums sometimes offer specially arranged tours and group rate discounts. Some Clubs sponsor a “Monthly Dinner Series,” where members meet at the restaurant of the month. Monday or Tuesday nights give you the opportunity to negotiate a discounted price with the restaurant selected.

### **Career Conferences, Forums and Breakfasts**

Of significant interest for most people is career development and growth. Career forums reach across a wide spectrum of ages and stages because the job market remains volatile and ever changing. Career events can focus on the basics such as resume building, networking, interviewing, and negotiations; or can turn to broader subjects such as career shifting, entrepreneurial ventures, or a particular field and its job market. Additional information about planning a career event is available from the Association.

### **Community Projects**

With hundreds of thousands of local and national charities in the US, there often are many opportunities to gather a group of alumni to “give back” to the community or participate in a cause while providing a social environment. Find out about the annual events in your community, or develop your own ideas based on Club members’ interests. Clubs have participated in events such as the “Walk for Hunger” or “Habitat for Humanity.” Some Clubs use this opportunity to promote the MIT name in their communities by creating MIT type of community projects. For example, building handicapped ramps around the city, or sponsoring a Chess competition to raise funds for a certain project. Many Clubs have also held their own fundraising events to raise money for the Club’s MIT Scholarship Fund.

### **Entrepreneurial Events**

The entrepreneurial spirit of MIT continues among its alumni, who have a remarkable record for initiating start-up companies. If there is a local MIT Enterprise Forum™ chapter in your area, work with that group to co-sponsor events. Many new or well-situated entrepreneurs enjoy the opportunity to meet together and talk about patents, business plans and marketing. There are some Clubs that provide excellent models for such activities as roundtable discussions, networking breakfasts and instructional presentations on protecting intellectual property and finding venture capital.

### **Family Outings**

There is most certainly a group of alumni, often in the classes from 1980s and the 1990s who have young children. It is strongly suggested that each Club study their area’s demographics and develop events specifically for this audience. Picnics, hikes, low-key bike rides, apple picking, pumpkin carving, children’s museum trips, zoo tours, and other family fun outings are suggested.

### **IVY+ Events**

Many MIT Clubs plan events with the Ivy League and Stanford alumni in the area. In many major cities, there is an active IVY+ chapter or IVY+ singles program. Clubs are also encouraged to plan events in cooperation with local colleges and alumni Clubs from other institutions.

## **Sports**

Popular among MIT undergrads, sporting events continue to provide a healthy outlet for Alumni Clubs. Such events that are popular are: sailing, hiking, biking, volleyball, rollerblading, tennis tournaments, golf outings, recreational swimming, mountain climbing and more. Sporting events are usually easy to organize and are inexpensive, and will appeal to a wide variety of alumni. Most alumni follow the New England major league sports teams and some Clubs organize Red Sox or Celtics sports outings.

## **Student Connections**

Events that welcome newly admitted students or offer the opportunity for alumni to meet with current students are enjoyed by the alumni and students alike. You can plan receptions and gatherings not only for students and alumni, but also for the parents of students who would appreciate the local MIT connections. The Parents Association can offer suggestions for events. In addition, the Club should publicize the IAP Externship program, when alumni can host student externs during the month of January.

## **MIT10 Events**

It is vital that a Club captures the interest of the MIT10 and maintain their participation as the years pass. MIT10 events can be simple social gatherings at local pubs, cybercafés, or restaurants. In addition, events that focus on younger alumni issues, such as topics like, "Buying Your First House," "Career Development" and "Singles Events" have proven popular. In many cities, alumni work together with groups from Ivy League institutions and Stanford to plan such events and programs.

The MIT Alumni Association, in conjunction with clubs, now holds an annual Toast to IAP event each January in an effort to keep recent graduates connected to the Spirit of IAP. Clubs host events regionally, and the MITAA provides invitations as well as an "event box" of event supplies for the program coordinators. For more information on how to participate in a Toast to IAP event, please contact your Alumni Affairs Officer.

## H. Faculty Speakers

The Alumni Education department is the central resource for MIT Clubs to make requests for presentations by MIT faculty and senior administrators.

The Association tries to meet as many of your requests as possible within the resources provided by MIT. Depending on faculty volunteering their time and effort for this service, we have outlined the following guidelines:

- The Association will pay travel and hotel expenses for faculty visiting MIT Clubs in North America, and will continue to advise international Clubs of faculty travels when we have such information. We will pay for one faculty member per club per year.
- Our priority is to attempt to send faculty to Clubs that are recognized as an official MIT Club (if in doubt, check with your AAO).

Although the aim of Alumni Education is to do its best to meet the specific requests of each Club, it is not always possible to do so. Ultimately, our ability to fulfill your requests lies in the particular schedules of the faculty and senior administrators.

Planning for a visit by the President of MIT follows a different procedure. The President's travel schedule is planned by a committee at least one year in advance. As we become aware of her travel schedule and the potential for a Club visit, we will inform the appropriate Club as soon as possible to begin the event planning process.

Faculty members volunteer their time to travel for the Association. It is important that they feel their travels to Club areas are a good use of their time. Therefore, we ask that Clubs follow these attendance guidelines:

For the President of MIT

- Major Markets: Minimum of 100 attendees
- Mid-sized Markets: Minimum of 75 attendees
- Small Markets: no set standard, the Association will set an appropriate level whenever needed

For the Chancellor, Provost, Dean, or Association President

- Major Markets: 50 - 75 attendees
- Mid-sized Markets: 35-50 attendees
- Small Markets: 25 attendees

For faculty or notable alumni

- Major Markets: 35 - 50 attendees
- Mid-sized Markets: 25 - 35 attendees
- Small Markets: 25 attendees

Requests for speakers may be made using the MIT Club Speaker Request Form (following this section), online at [alum.mit.edu/ccg/Clubs/toolkit/event-planning/speakers-bureau/requests.html](http://alum.mit.edu/ccg/Clubs/toolkit/event-planning/speakers-bureau/requests.html), or by contacting Kim Cole at [kcole@mit.edu](mailto:kcole@mit.edu).

Remember, the best way to attract a faculty member to give a talk to your Club is to find someone who is already planning to travel to your area. So, keep your ears and eyes open for any information on faculty travel in your locale and let us know.

### **Guidelines for Organizing an Event Featuring a Presentation by an MIT Faculty Member**

- **Event Organizer:** Designate one person to chair the event and to serve as the liaison with the Alumni Education group.
- **Request:** Submit your request as far in advance as possible, allow at least three months.
- **Options:** Be open to presentations by younger members of the faculty who may not be full professors. The most well-known are most likely to be the ones we would have the least success in obtaining.
- **Attendance:** Attendance level is crucial. Keep in mind that the faculty members are volunteers who are giving us time that could be spent in their labs, with their families, or doing research. For this reason, we ask Clubs to follow the attendance guidelines listed above.
- **SmarTrans™:** All faculty events must be registered on SmarTrans™
- **Event Details:** Work out all arrangements for faculty AV needs through the Alumni Education group.
- **Gifts:** As an added touch, a small gift of appreciation for the speaker is a welcomed keepsake.
- **Post Event Items:** After the event, send a thank-you letter to the speaker. A Speaker Evaluation form will be sent to you through email for you to complete and return to the Association.

**MIT ALIMNI ASSOCIATION  
ALUMNI EDUCATION  
MIT CLUB SPEAKER REQUEST FORM**

Name of Club: \_\_\_\_\_

Program Coordinator: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: (H) \_\_\_\_\_ (B) \_\_\_\_\_ Fax \_\_\_\_\_

Email: \_\_\_\_\_

A) Preferred Topics/Speakers:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

B) Preferred Event Month (provide three options in priority order)

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

C) Preferred Day of the Week

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

D) Preferred Event Type

Breakfast    Lunch    Cocktails    Dinner

E) Will you need address data from the Association for event promotion?

Yes    No

Please mail or fax to:

Kim Cole

Associate Director, Alumni Education

201 Vassar Street, Building W59-200

Cambridge, MA 02139

Fax: 617-258-6211

Phone: 617-252-1149

**CLUB EVALUATION FORM**

Name of Club: \_\_\_\_\_  
Program Coordinator: \_\_\_\_\_  
Event: \_\_\_\_\_  
Date: \_\_\_\_\_  
Speaker: \_\_\_\_\_  
Topic: \_\_\_\_\_  
Number of Attendees: \_\_\_\_\_

Please rate: 1 = lower, 4 = higher

Interesting Topic:           \_\_1\_\_2\_\_3\_\_4

Presentation Skills of Speaker:   \_\_1\_\_2\_\_3\_\_4

Quality of Audio/Visuals:       \_\_1\_\_2\_\_3\_\_4

Quality of Venue:               \_\_1\_\_2\_\_3\_\_4

Length of Presentation:       \_\_ too short   \_\_about right   \_\_too long

Question & Answer Period\_\_ too short   \_\_about right   \_\_too long

Would you attend another talk given by this speaker? \_\_Yes \_\_ No

Why? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please mail or fax to:  
Kim Cole  
Associate Director, Alumni Education  
201 Vassar Street, Building W59-200  
Cambridge, MA 02139  
Fax: 617-258-6211  
Phone: 617-252-1149

# I. Additional Association Services for Clubs

## **Clubs and Regional Programs:**

The first, and central, point of contact with the Alumni Association is through Alumni Affairs Officers (AAO) for Clubs and Regional Programs. This group is lead by Director Melissa Marquardt. Two associate directors assist the directors to serve 89 domestic and international Clubs and five Affinity Groups. Their primary responsibilities are to provide Clubs and Groups with guidance and suggestions and to be an information resource for Association and MIT services. You can always count on your AAO for help with:

- Event ideas
- Location and planning tips
- Attendance and membership recruitment strategies
- Succession and planning
- Advice and consultation on Club requirements
- Mailing procedures and labels
- Providing faculty and administrators as speakers
- Sample or templates for letters and other correspondences
- MIT event supplies such as name badges, banners and balloons

## **Alumni Affairs Officer and Their Associated Regions**

**Melissa Marquardt, Director Clubs and Regional Programs**  
(617) 253-8244 [melissam@mit.edu](mailto:melissam@mit.edu)

### **United States Clubs**

Boston

### **All International Clubs except Canada**

*ASIA* Hong Kong, Bombay, New Delhi, Japan, Korea, Malaysia, Beijing, Shanghai, Philippines, Singapore, Taiwan, Thailand

*EUROPE* Belgium, Bulgaria Area, France, Germany, Great Britain, Greece, Ireland, Italy, Netherlands Area, Norway, Portugal, Spain, Switzerland, Trieste Area, Turkey

*MIDDLE EAST/AFRICA* Egypt, Israel, Lebanon, Nigeria, Pakistan, Saudi Arabia, South Africa, United Arab Emirates Area

*NORTH AMERICA* Mexico, Monterrey

*SOUTH/CENTRAL AMERICA* Buenos Aires, Brazil, The Caribbean, Chile, Colombia, El Salvador, Guatemala

**Moana Bentin, Associate Director Clubs and Regional Programs**  
**(617) 324-0379 mbentin@mit.edu**

**United States Clubs – Primarily Clubs East of the Mississippi**

Alabama, Hartford, New Haven, Washington, D.C., Central Florida, the Palm Beach Region, South Florida, Southwest Florida, Tampa Bay, Atlanta, Maine, Baltimore, Cape Cod, Southeastern Mass, Long Island, New York, Rochester, Western NY (Buffalo), New Hampshire, Northern New Jersey, Princeton, Research Triangle Park, Rhode Island, Delaware Valley, Puerto Rico, South Carolina & Coastal Georgia, Vermont

**International Clubs**

CANADA Montreal, Ottawa, Toronto

**Affinity Groups**

BAMIT (Black Alumni of MIT), BGALA (Bisexual, Gay & Lesbian Alumni), CAMIT (Chinese Alumni of MIT), MIT SAAA (MIT South Asian Alumni Association)

**Alumni Affairs Officer position to be filled**  
**In the interim, please contact Melissa Marquardt or Moana Bentin**

**United States Clubs – Primarily Clubs West of the Mississippi**

Phoenix, Northern California, San Diego, Southern California, Colorado, Hawaii, Chicago, Louisiana & Southern Mississippi, Minnesota, Southeast Michigan, St Louis, Southern Nevada, New Mexico, Northeast Ohio, Oregon & SW Washington, Austin, Dallas/Ft. Worth, South Texas, Salt Lake City Area, Wisconsin, Puget Sound

**Affinity Groups:** AMITA (Association of MIT Alumnae), MITAAA (MIT Arab Association), LAMIT (Latino/a Alumni/ae of MIT)

**Other Contact Information**

**Russell Boulais, Administrative Assistant, (617) 253-8205 rboulais@mit.edu**

The administrative assistant for Clubs and Regional Activities is assigned specific job functions serving all Clubs and groups. In addition to supporting the Clubs directors and assistant directors, the administrative assistant processes new neighbors reports, individual Club billing, officer and event databases, data requests, as well as maintaining web pages.

Other key Association staff that work with Clubs and Regional Programs.

**Sandra Mallalieu, Director of Online Services**

The Director of Online Services provides all Club and Group Leaders training on Association online applications such as SmarTrans™ and Alumni Site Builder™. Trainings are offered regularly using web conferencing systems. All volunteers need to take the training to be able to have access privileges to these applications.

**Marilyn Finlay, Senior Data Integrity Assistant, (617) 253-8305 mfinlay@mit.edu**

The integrity and accuracy of all Clubs and Classes alumni data is the responsibility of the Data Integrity Assistant. She is the primary contact for membership lists, email listservs, address updates, information updates, and Club directories. This position also provides customer support for SmarTrans and Alumni Site Builder

**Nora Zheng, Administrative Assistant Online Services, 617-253-6358 ndzheng@mit.edu**

The Administrative Assistant for Online Services schedules volunteer training for SmarTrans and Alumni Site Builder. This position is key to online services customer support.

**Kim Cole, Associate Director, Alumni Education, (617) 252-1149 kcole@mit.edu**

The Associate Director coordinates faculty speakers to Clubs. She is responsible for coordinating the Young Alumni Seminar Series, the Graduate Alumni Advisory Committee, and alumni outreach by MIT's academic departments.

**Greg Bourne, Alumni Association Webmaster, 617-253-8245 gbourne@mit.edu**

The Alumni Association webmaster provides help desk support for Infinite Connection accounts, Online Alumni Directory and alumweb webmaster.

**CLUB DEMOGRAPHIC PROFILES**

The Association provides each Club with a demographic profile of its local alumni population. This will include a complete list of all living alumni in the Club area as well as their names and address information. It will also include numbers of alumni within the area sorted by zip code, class, and course. Other lists can be requested through your AAO.

**CLUB LEADERS TOOLKIT**

<http://alum.mit.edu/Clubs/toolkit/>

The Club Leaders Toolkit is designed to help officers build their Clubs. Resources include helpful ideas from experienced Club leaders, management resources, a mid-year assessment guide, mailing information, annual reports, recruitment help, event planning guide, *FOCUS* newsletter in pdf format, a presentation guide, templates and more.

***FOCUS***

The Clubs and Regional Program produces this quarterly newsletter for Club officers around the world. The newsletter is filled with timely and helpful information such as increasing MIT10 involvement in your Club, news about postal and non-profit regulations, and announcing upcoming Association events. It is also available online at [/alum.mit.edu/Clubs/toolkit/reference/](http://alum.mit.edu/Clubs/toolkit/reference/)

**MIT GRAPHIC IDENTITY**

<http://web.mit.edu/graphicidentity/>

MIT's Publishing Services Bureau has provided this online resource guide that provides the tools and guidelines you'll need to integrate the MIT identity into your print and electronic media, along with some handy templates and other key resources.

**MIT SUPPLIES**

Nametags with the Association logo are available, at cost, for your Club. MIT banners can be borrowed on a first-come, first-serve basis. They may also be purchased by the Club via The Coop link located on the Clubs Web page located at [/alum.mit.edu/ccg/Clubs](http://alum.mit.edu/ccg/Clubs). The Custom Factory at the MIT Coop Online is your one-stop source for customized promotional gear. Almost any item can be imprinted with your Club logo.

Follow the link above, or contact Allan Powell (617-499-2025) or Louise Petrozzelli (617-499-2008) with questions or for items you do not see offered.

### **NEW NEIGHBORS LISTS**

Three separate reports are emailed to each Club president monthly. These reports lists alumni who move into and within your club area and those with any past MIT volunteer experience.

### **ASSOCIATION MAILING LISTS**

#### **Purpose of Association Email Mailing Lists**

Association mailing lists support the work of volunteers in carrying out volunteer responsibilities. Common uses of mailing lists are notification of Club meeting, events, solicitation of class notes, reunion updates, and other purposes for which the volunteer and staff have agreed.

Association lists do not include lists alumni create themselves within the Infinite Connection. However, alumni can view available Association lists and manage Association list subscriptions from within the Infinite Connection.

#### **How Lists Are Created**

A programmer creates a program to select all alumni who meet a pre-defined set of criteria to populate the list. The list could include all members of a particular alumni group, such as a class, Club, or affinity group, or all members of a particular geographic region. The list will be "refreshed" on a weekly basis. When the list is refreshed, the program runs and re-evaluates who in the alumni database meets the criteria for being included on the list.

**Alumni can make changes to their subscriptions** (i.e. subscribing and unsubscribing) directly through the Association Web Site at <http://alum.mit.edu/as/online-services/index.html>. When an alumnus logs into the site using his/her Infinite Connection Account, his/her personal profile will be shown. Located on the lower part of the profile screen, the alum will see the header "Mailing Lists" followed by links to the lists to which the alumnus is subscribed. By following the links to the lists, an alum can unsubscribe, or change his/her list settings to complete such tasks as temporarily suspend receipt of email from the list. In addition, each message sent by the listserv automatically includes unsubscribe email instructions: "To unsubscribe from this mailing list, send a blank email to [list\\_unsubscribe@alum.mit.edu](mailto:list_unsubscribe@alum.mit.edu) and put the list name in the subject line." Changes alumni make within the Infinite Connection or by contacting the Association will take effect within two hours and will not be affected by the weekly refreshing process.

**Each list can have one or several Alumni Editors** who can post to the list. All List Editors must have Infinite Connection accounts and an active Email Forwarding for Life address. Association staff members can also server as List Editors. For all Association lists, an Association staff person will serve as list Manager. The List Manager maintains all list settings and can also subscribe and unsubscribe alumni from the list as necessary.

#### **List Editors can post to the list from any active Email Forwarding for Life (EFL) forwarding address.**

Editors can update their forwarding addresses through the Infinite Connection. If postings are made from an address that is not an active EFL address of a List Editor, those postings will be forwarded to the List Moderator(s).

**List Editors can also serve as Moderators.** List Moderators receive messages sent to the list by non-Editors and can then decide if the message should be sent on to the entire list. Lists can also be configured so that

postings made by non-Editors are held on the Listserv server pending approval by the list Moderator. List Editors should contact the List Manager if they would like to serve as List Moderators.

Some Association lists allow all list members to post messages to the list. Such lists usually have fewer members and act more as 'discussion-type' lists rather than as an 'announcement-type' list. In this case there is no need for List Editors and Moderators. However, such lists will still have an Association staff member serve as List Manager.

### **Reply-To**

One of the headers that often appear in email messages (along with From:, To:, Subject:, etc) is the Reply-To address. The email application addresses a new message to this address when the user chooses the Reply command. When Listserv distributes messages to a list, it sets the Reply-To address that is included in the message.

Generally, for Association lists, the Reply-To address for a message to the list should be set to the address of the sender. It is possible for the List Manager (an Association staff member) to change the Reply-To address. However, this approach should be taken only if such changes are made very infrequently.

Some lists allow all members to post messages to the list. In this case, the Reply-To address should be set to the address of the list.

### **Notification**

The email list volunteer and/or the staff editor will biannually send a message to the entire list to describe the purpose of the list and the expected frequency of messages. If emails lists are to continue to be an effective means of communication, and not another source of junk mail, it is imperative that the number of messages sent be limited and reasonable. Suggested text for such an email can be provided to you by an Association staff member.

### **Frequency**

The frequency of messages range from biweekly (sufficient for most lists) to quarterly or bimonthly (which have a time-specific purpose). Most alumni who request removal from Association email lists do so because they feel they are being sent too much email from a list, and refer to this as being spammed. It is important to continually evaluate how much mail you are sending and to consider that any given alumnus may be on a Club list, a list for their class, department, affinity group, sports team, etc.

### **Messages to the List**

Authorized volunteers (Editors) and Association staff List Managers are the only people who can send messages to an Association list. The Association should not initiate messages to a group's list without first contacting a List Editor for that list. This procedure will prevent unauthorized users from posting to the list. Other messages will be forwarded to the List Moderator(s) who will review it to determine if it should be sent. Where there are questions or concerns, staff and volunteers will determine together if a message should be sent to the entire list.

### **Bounces**

Bounced messages will be received by the Association. Addresses that bounce multiple times will be removed from mailing lists.

The following is a sample email for staff and volunteers to edit as necessary and send to email lists as suggested in the email list procedures. We recommend this type of memo be sent at least twice a year, more frequently if many names have been added to the list or if the purpose for the list changes.

Memo To: [Name of group]  
Subject: Purpose of email list for [name of group]  
From: [AA Staff and volunteer list editors, use your names!]

We have created this email list for the use of [Club name]. [Volunteer name(s)] is(are) the member(s) of the group who will be responsible for the use of the list; [staff member name] is the AA staff member who works with the group. The group email address is < >

You can expect roughly [#] messages a year from this list; we plan to use it for [purpose of list]. MIT makes this service available to alumni groups on the assumption that we will abide by all MIT rules and regulations regarding the use of the Internet electronic mail system.

The list is maintained by the Association and refreshed weekly. To be sure that your address is current, we encourage all alumni to register for an Infinite Connection account and the Association's email Forwarding for Life service for which you may choose a permanent email address at MIT. To register, please go to [alum.mit.edu/index](http://alum.mit.edu/index). If you need assistance you may send an email to [help@alum.mit.edu](mailto:help@alum.mit.edu) or call Greg Bourne at 617-253-8245.

#### **DATABASE SERVICES**

The Association's Alumni and Development Database System (Advance) includes:

- all known living graduates of the Institute
- anyone who has attended MIT for two semesters or more who has requested that they be added as an alumnus, including visiting fellows
- honorary members
- widows and widowers, if information has been made available
- parents, if information has been made available
- faculty, if information has been made available
- friends (donors)
- current students, if information has been made available

#### **Address Updates**

The Association staff asks Clubs to encourage their members to maintain accurate address information with the Association. Alumni may call, write, or fax new information to the Association; if Institute records are incorrect (through returned mail or phone campaigns), please forward the returned mail to:

Alumni Records  
Association of Alumni of MIT  
77 Massachusetts Avenue, Building W92-280  
Cambridge, MA 02139

Alumni may also update their addresses online at [/alum.mit.edu/user/profile/Yourinfor.dyn](http://alum.mit.edu/user/profile/Yourinfor.dyn). If you do not have a returned piece of mail, you may wish to use the address update form in the appendix or email [mitalum@mit.edu](mailto:mitalum@mit.edu). Please make photocopies as needed.

### **Winter and Summer Addresses**

A concern for many alumni is the transition from primary address to alternate address in the Association database. The Association has the capability to maintain an alternate address. Many alumni feel they must continually tell the Association each time they move back and forth from their alternate addresses. The address transition can be considerably smoother if the alumnus simply notifies the Association of the date range (beginning and ending dates) that he/she will be at their alternate addresses. At the beginning of each month, the Alumni Records Department downloads a listing of address changes for that month. Because this download is based on date, it is imperative that we receive the date range of the alternate address so we will know when to change it back to the previous address. You can communicate the alternate address date range to the Association via the same means as any normal address update, by sending an email to [mitalum@mit.edu](mailto:mitalum@mit.edu), by sending to the Alumni Records address listed above, or by calling 800-MIT-1865.

### **Club Membership Information**

In order to facilitate a smoother flow of information between Clubs and the Association, Clubs should submit their membership lists for the year no later than October 15. Memberships submitted thereafter on a rolling basis will be processed within 10 working days of their receipt.

When submitting Club membership updates, please send only the names of current members who did not pay through SmarTrans™ for the present fiscal year should be sent. Clubs should provide the Association with an alphabetical listing of members as well as their sequence number (alumni identification number which helps the database staff to accurately code the correct alumnus as many have similar names). Please include member type, payment amount, and payment date.

### **Keeping the Club Up-to-Date**

The Association is committed to maintaining a top-rate alumni database, with the most current information on all of our alumni. Clubs can help to ensure that the data in the Association's database is accurate by providing regular address and membership updates from your local constituency. The Association's database captures an alumnus' home and work address, work title and company, home and work telephone and fax numbers, and one email address, and identifies the alumnus by a unique sequence number. The address at which the alumnus wishes to receive mail is marked on the Association's database as preferred. In addition, year of graduation and course are included. When you are sending out membership renewal or acquisition letters, your membership form should request and record the same information. Be sure to request full names, not nicknames, and ask alumni to include their class year or years. If you suspect a nickname has been used, please call the alumnus and clarify their full name before sending updates to the Association. Getting all of the information makes the data more reliable and helps the Association staff complete accurate data entry.

Some Clubs maintain their own databases. We strongly recommend that the Association maintains your Club database. We urge Clubs who are conducting any type of mailing to use Association produced data. Do not re-use data sent several months later, but instead download or request new data or labels **each time** you conduct a mailing.

You can send your address and membership updates electronically as soon as you have them.

### **Sending Address Updates Electronically**

Send email to Marilyn Finlay at [mfinlay@mit.edu](mailto:mfinlay@mit.edu)

In subject line of message type "Address update - Club of [Club name]"

In body of message, type your name, contact information, and Club position

For each alumnus address update include their sequence number (if known), full name, class year, and new address information.

Allow ten days from the date of your email for the address update to be reflected in the Association database.

#### Sample Address Update Email

To: mfinlay@mit.edu  
From: John Smith <jsmith@aol.com>  
Subject: Address Update—Club of Boston

Included below are address updates from the MIT Club of Boston. I am John Smith, VP of Membership. Questions about these changes should be directed at me at jsmith@aol.com or 617-555-5555.

1995 001 060 Suzi L. Charles '95  
New address:  
567 Memorial Drive  
Cambridge, MA 02139  
New home phone: 617-555-1111  
New email: suzi@suzi.com

Suzi sent the Club a change of address card.

#### **Sending Membership Updates Electronically**

Send email to Marilyn Finlay at mfinlay@mit.edu  
In subject line type "Membership Update - Club of [Club name]  
In body of message, type your name, contact information, and Club position.  
Send new members as a comma delimited text file. Include for each new member sequence number (if known), full name, class year, membership level, and amount paid.

***Do not send address changes in a membership update email or vice versa. Please send separate emails for the different types of updates.***

## **J. Alumni Association Mission/Staff/Programs**

### **MISSION**

The mission of the Association is to serve the needs of MIT and those of its alumni and alumnae. The Association serves MIT's needs for leadership, volunteer commitment, financial support, and communications, including public relations. The Association serves the alumni by networking with one another, providing connections to MIT and offering appropriate activities and services.

### **VOLUNTEER STRUCTURE OF THE ASSOCIATION**

The Association of Alumni and Alumnae of MIT is governed by a Board of Directors consisting of: one President, (1-year term); four Vice Presidents (2-year terms); eleven District Directors, (2-year terms); and three ex-officio members (the two most recent past Presidents and the Executive Vice President of the Association). Copies of both the Constitution and Bylaws of the Association are on file in the Alumni office and can be obtained through your AAO.

The Association's Board of Directors is composed entirely of volunteers, the only exception being the Executive Vice President of the Association. Many of these volunteers have served in various regional Clubs. Members of the Board are appointed by the National Selection Committee (NSC), which in turn is composed of alumni who represent the eleven U.S electoral districts (refer to Appendix for detailed listing) and who are elected to a 3-year term by an annual ballot. Ballots are circulated to all alumni each February in the March issue of Technology Review. Candidates for this ballot are nominated by Clubs within the district(s) which have an open term. The NSC, complete with its newly elected members, typically meets each spring to select members of the Association's Board for the following academic year.

District Directors are urged to seek, from time to time, the advice of their respective regional Clubs concerning nominees for various Association committees or regarding policy issues under consideration by the Association Board.

### **Purpose of MIT Clubs**

The purpose of MIT alumni Clubs is to support the mission of the Association by providing opportunities for alumni, parents, students, and friends to enjoy the advantages of fellowship with one another and the power of forming an alumni network. Through Club organizations and programs, alumni can renew their ties to the Institute, advancing its good name and its cause among alumni, prospective students and the general public.

Across the nation and around the world, MIT alumni Clubs draw thousands of alumni, parents, students, and friends to a broad range of social and educational activities. Since MIT Clubs reflect the diversity of our alumni body, events range from faculty speakers to career workshops, from plant tours to sporting events all in an effort to promote the Institute and provide enlightenment about its programs. In addition, a number of Clubs have a public service entity in which one may find people tutoring high-school students or painting a shelter for battered women. Club leadership is drawn from local alumni volunteers who serve as officers or Board members and often rise to positions on the Association's national boards and committees.

### **Supporting other Association Programs**

Clubs are encouraged to support the alumni population in other Institute activities. With the crucial support of many energetic alumni volunteers, the Association staff plans numerous campus-based and long distance programs and events described below. Clubs are encouraged to support these means of reconnecting alumni with their alma mater by publicizing events and lending volunteer assistance.

## **AFFINITY GROUPS**

MIT alumni are a diverse group representing many nationalities and ethnic backgrounds. Because there are many special interest support groups while students are on campus, many alumni choose to continue those links by starting local MIT special interest groups under the auspices of the MIT Club. More information on Affinity Groups can be found at <http://alum.mit.edu/ccg/affinity/index.html>. The following groups have been organized and have official status within the Association:

### ***AMITA (Association of MIT Alumnae)***

Founded in 1899 by Ellen Swallow Richards, MIT's first alumna, AMITA sponsors programs and projects to encourage alumnae interest in MIT and each other. More information is available at <http://alumweb.mit.edu/groups/amita/>

### ***BAMIT (Black Alumni of MIT)***

BAMIT is chartered by the Association to promote interest in MIT by black alumni, to serve as a resource for black students, and to provide continuing input in the shaping of decisions and policies affecting the black community at MIT. In addition to these activities, since 1988, BAMIT has sponsored the Ronald E. McNair PH '77 Endowment Fund to benefit minority student scholarships. More information is available at <http://www.bamit.org/>

### ***BGALA (Bisexual, Gay and Lesbian Alumni of MIT)***

BGALA's mission is to provide a social and professional network for MIT alumni who are supportive of sexual minorities, to dedicate itself to improving the quality of life for sexual minorities at MIT, and to work with current students and the MIT administration in support of these goals. More information is available at <http://alumweb.mit.edu/groups/bgala/>

### ***CAMIT (Chinese Alumni of MIT)***

CAMIT, Inc. is an organization of alumni who are of Chinese descent. Because CAMIT draws its members from around the world, there are more than 5,000 alumni on the CAMIT mailing list. In addition to their annual programs, CAMIT also has participated in the fundraising efforts for the Chinese Language, Literature and Cultural Program at MIT. More information is available at <http://alumweb.mit.edu/groups/camit/>

### ***LAMIT (Latino/a Alumni/ae of MIT)***

Founded in 2006, MITGUA supports professional and personal development for Latino/Hispanic alumni/ae, connections and support for current MIT students, and outreach to potential MIT applicants.

### ***MITAAA (MIT Arab Alumni Association)***

The Arab alumni group was organized in 1997 and has more than 600 constituents worldwide. Their objectives include increasing awareness among Arab alumni of the resources and backgrounds of other alumni and MIT, fostering stronger social and business links between Arab alumni, and creating a support network for alumni in each country of the Arab world. More information is available at <http://alumweb.mit.edu/groups/arab/>

### ***MITSAAA (MIT South Asian Alumni Association)***

Also founded in 2006, MITSAAA supports professional and personal development for alumni of South Asian decent worldwide, as well as support for current MIT students and outreach to potential MIT applicants.

### **ALUMNI CAMPUS ID CARDS**

Alumni can now get an MIT Alumni Campus ID card to use at the MIT athletic facilities, MIT libraries, for on-campus advising a student group or frequent campus visits. The card is free, but some services have a fee, e.g. library borrowing privileges, athletics dept. membership.

### **ALUMNI CONTINUING EDUCATION PROGRAMS**

These programs will include the range of alumni programs with educational content, of quality and intellectual level consistent with the Institute's reputation, which encourage and strengthen alumni ties with the Institute beyond the standard Club speaker event. A major focus is the "MIT on the Road" effort, and expansion of the educational content of the Alumni Travel Programs.

The "MIT on the Road" format consists of a one or multi-day format of faculty lectures/interaction on a given theme, plus socializing/recreation, offered in conjunction with Clubs/classes. Destination, theme, and frequency will be coordinated with other objectives, such as planned senior officer travel, resource development or other MIT initiatives, and alumni interests/needs. This may include several MIT faculty educational presentations as well as activities related to class mini-reunions. While overall direction and coordination will be from MIT, there will be ongoing and important assistance from a committee of local area alumni.

### **ALUMNI FUND**

The Alumni Fund was established in 1940 to solicit annual gifts from alumni in support of MIT. Since then, gifts have helped to make up the difference between tuition and the full cost of an MIT education, which is typically double the cost of tuition. Gifts have also helped MIT harden faculty salaries, build and enhance facilities, and support unique programs such as UROP. For fiscal year 2005, the MIT Alumni Fund raised \$33,527,830 in gifts from 32,010 alumni, giving generously at the highest gift levels.

### **ALUMNI INTERFRATERNITY COUNCIL**

The Alumni Interfraternity Council is a confederation of alumni officers and house corporation leaders of independent living groups (ILGs) at MIT who meet quarterly to discuss issues pertinent to the ILGs.

### **ALUMNI LEADERSHIP CONFERENCE (ALC)**

Each year, the Association sponsors the Alumni Leadership Conference (ALC) for volunteers from around the world. All current and new officers from Association programs, including National, Clubs, Classes and Reunions, Educational Council, Alumni Fund, Enterprise Forum® Chapter are invited to attend.

Through discussions and workshops, attendees are encouraged to discuss goals with Association staff, and to exchange ideas about activities, common problems, and program know-how. Association officers report on the status of the Association, and Institute speakers provide their views on campus developments. In addition, outstanding volunteers from all programs are recognized with Association awards.

The conference is generally held at MIT on a Friday and Saturday in September or October. Travel and lodging are paid for by alumni attendees with the Association covering the majority of other conference expenses. At present, there is a transportation subsidy for alumni who graduated within the past 10 years.

### **AWARDS**

#### ***Bronze Beaver***

The Bronze Beaver is the highest honor the Association can bestow upon any of its members. It is awarded in recognition of distinguished service to the Institute and/or its Association of Alumni and Alumnae.

### ***Lobdell Award***

The Harold E. Lobdell '17 Distinguished Service Award is given in recognition of valuable alumni relations service to the Institute and/or the Association, that is of special depth over a sustained period.

### ***Morgan Award***

The George A. Morgan '20 Award is given in recognition of sustained excellence in all aspects of Educational Council activity, including dedication to MIT, an abiding concern for and sensitivity to the best interests of prospective students, and exceptional standards of achievement and professionalism in the execution of Council responsibilities.

### ***Kane Award***

The Henry B. Kane '24 Award is given in recognition of exceptional service and accomplishments in fundraising for the Institute or the Association.

### ***Presidential Citation***

The Presidential Citation is the highest honor the Association can bestow upon any of its organizations. It is awarded in recognition of distinguished service to the Institute and/or the Association.

### ***Honorary Membership***

Anyone who is not an MIT alumnus/a, including any present or former member of the Corporation, as well as his or her spouse, who has rendered outstanding service to the Association or the Institute, may be elected to Honorary Membership in the Association, with all privileges except voting.

### ***Club Awards***

It is possible for the Association to print special certificates of merit recognizing service in a particular Club. These might go to retiring officers or Board members, or to someone else in the Club whose work is very much valued. The AAO for Clubs can assist in arranging to have the appropriate certificate printed. These might be provided strictly for use and be signed by the Club President, or reflect national appreciation and be signed by the Executive Vice President of the Association.

### ***Volunteer Honor Roll***

The Volunteer Honor Roll was created to recognize extraordinary individual performance by a volunteer at the local level in the current year. Alumni, parents, widows, spouses, faculty and students are eligible. We urge you to nominate an outstanding volunteer for his or her efforts this year.

<http://alum.mit.edu/gv/volunteer/recognition/vhr.html>

## **EDUCATIONAL COUNCIL**

The Educational Council is a network of alumni who represent MIT in their local communities by interviewing and providing information to candidates for admission to the freshman class. Alumni who are interested and expect to be in the same geographic area for at least two years should visit their website <http://web.mit.edu/admissions/www/educoun/> or call the Educational Council Office at 617-253-3354.

## **THE ENTERPRISE FORUM**

The Enterprise Forum® is a not-for-profit public service organization under the auspices of the Association. The Forum was founded in 1978 to promote and strengthen the process of launching and growing companies, primarily those that have a strong technology orientation, by educating and inspiring entrepreneurs and supporters of entrepreneurship. The Forum operates through a network of 23 chapters—based in the U.S. and overseas—that sponsor entrepreneurial education programs, professional

seminars, start-up clinics, business plan workshops, and networking opportunities. For further information about the Enterprise Forum®, contact its Executive Office at 617-253-0015 or visit their website <http://enterpriseforum.mit.edu/>.

### **ICAN (INSTITUTE CAREER ALUMNI NETWORK)**

The Institute Career Alumni Network (ICAN) is a program through which MIT students and alumni can network with other alumni for assistance with career planning or job searches. Using our database of 2,800 alumni mentors in 100 career fields, alumni seeking assistance search on-line for career advisors in their geographic area whose occupation or career fits their interests. In addition to networking, ICAN's other services include a compendium of job-search skills and bibliography of self-help materials. To volunteer as an ICAN member or to receive more information, please visit our website <http://alum.mit.edu/cs/ican/index.html>.

### **INFINITE CONNECTION**

The mission of the Infinite Connection is to establish, promote and manage a worldwide electronic community consisting of MIT alumni and the MIT community in Cambridge. This will provide opportunities for both alumni and members of the Institute to build and strengthen relationships with one another. All alumni are encouraged to gain an Infinite Connection Account.

Current available services are Email Forwarding for Life (EFL), the MIT Online Alumni Directory, and URL forwarding, Email Lists, Career Mentors, and Online Services for Volunteers. For more information about the Infinite Connection visit the Association website or call 1-800-MIT-1865.

### **INFINITE CONNECTION LITE**

We we have enhanced the Infinite Connection to allow for some members of our community to access features previously unavailable to them. Now parents of MIT students, Enterprise Forum members, friends of the Institute and associate members of the MITAA may sign up for Infinite Connection accounts with limited access to the site. These groups can now engage with the Association and affiliated groups (e.g., clubs, Enterprise Forum, Parents Association) in a more seamless manner.

Below is an outline of the services each group can access once they register for an account:

Parents, Enterprise Forum members, Friends

Mailing lists, Discussion Network, SmarTrans (registration page pre-populated with name/address information and can take on role as an event or membership manager), More personalized Giving to MIT (my account) changed order of bullets, ASB (can take on role as site/page manager), Update Your Info

Associate Members\*

Online Alumni Directory (OAD), including Institute Career Assistance Network (ICAN), Mailing lists, Discussion Network, SmarTrans (registration page pre-populated with name/address information and can take on role as an event or membership manager), ASB (can take on role as site/page manager), Update Your Info

\*Associate Members: An individual who has participated in non-degree-granting special and joint programs that meet time and admission criteria as determined by the Alumni Association Board of Directors. Examples of those programs are: HST (Harvard/MIT Division of Health Sciences and Technology), SPURS (Special Program for Urban and Regional Studies), and the Cambridge-MIT Exchange Program.

Note that all of these groups, along with alumni, go to the same URL to start the registration process on the alumni site ([https://alum.mit.edu/choose\\_relationship.vhtml](https://alum.mit.edu/choose_relationship.vhtml)).

### **LIBRARIES**

To borrow material for the MIT Libraries, alumni may obtain an MIT library privilege card (P-card) with a valid alumni campus ID. The cost for MIT alumni: \$150 year or \$90 half a year. Alumni library P-cards are available in Building 14-055 and online <http://libraries.mit.edu/ordering/p-cards.html>. Call 617-253-5668 or visit <http://libraries.mit.edu/> for information about the libraries.

### **MIT ePRONET**

MIT ePronet features an alumni database, job bulletin board, resume posting and career assessment tools as well as a placement service that matches corporate recruiting needs with graduates of participating schools. MIT alumni can join the network at no cost. To find out more about eProNet visit our web site <http://alum.mit.edu/cs/epronet/index.html>.

### **MONSTERTRAK**

Monstertrak is an online password protected database through which employers can post positions for MIT alumni and students. Visit the Monstertrak web site <http://www.monstertrak.monster.com/> to receive a password for MIT's Interview Trak database. Send your name, course number and year of graduation by e-mail to [career-www@mit.edu](mailto:career-www@mit.edu), or call 617-258-9155. MonsterTrak is updated daily and is free to MIT alumni and students.

### **OFF-CAMPUS HOUSING OFFICE**

Alumni have access to the off-campus rental listings free of charge. The listings are updated monthly and include houses, furnished and unfurnished apartments and studios. For information, call 617-253-1493, or visit <http://web.mit.edu/housing/och/>.

### **STUDENT PROGRAMS**

#### ***Student Ambassadors***

Student Ambassadors are current MIT students who serve the Association with alumni activities. The students are interviewed and trained in skills such as networking and time management. The purpose is to establish volunteer relationships with future alumni while they are still. Typical Ambassador assignments at events include greeting guests, taking tickets and registration. For more information about Student Ambassadors, go to <http://alum.mit.edu/ccg/students/ambassador/index.html>

### **THE IAP EXTERNSHIP PROGRAM**

The IAP Externship Program offers an opportunity for students to shadow alumni at their workplace. These unpaid externships take place during the month of January, the Independent Activities Period (IAP). Students spend anywhere from a day to a month with the alumnus/a in positions ranging from assisting in cardiac surgery to shadowing an environmental engineer, a venture capitalist, a law student and more. For more information about the Externship Program, please contact Lauren Durso at 617-252-1143 or email [externship@mit.edu](mailto:externship@mit.edu), or visit the website at <http://alum.mit.edu/ccg/students/externships/index.html>

### ***Tech Talk***

You can receive the printed version of *Tech Talk* in the mail for a cost of \$25 per year (US and Canada) or \$100 a year (airmail to other countries) nonrefundable. Checks should be made payable to MIT and mailed to the *Tech Talk* Business Manager, 77 Massachusetts Ave., Room 5-111, MIT, Cambridge, MA 02139. You can also get more information from the News Office by calling 617-253-2700 and by visiting <http://web.mit.edu/newsoffice/www>. Current *Tech Talk* articles can be found online at the <http://web.mit.edu/newsoffice/techtalk-info.html>.

### ***THE TECH***

The Tech subscriptions are \$45 a year. Checks should be made payable to The Tech and mailed to MIT, 84 Massachusetts Avenue, Room W20-483, Cambridge MA 02139.

### **TECH REUNIONS AND TECHNOLOGY DAY**

Each June, approximately 3,000 alumni and guests return to MIT for Reunions and Technology Day. Reunion classes, those celebrating quinquennial reunions from the 5<sup>th</sup> to the 70<sup>th</sup>, make up the largest number of returning alumni.

### ***TECHNOLOGY REVIEW***

The award-winning national magazine, *Technology Review*, includes articles by experts and journalists from around the world on important developments in technology and its implications. The edition of the magazine circulated to about 100,000 alumni carries the *MITNews* section that includes Class Notes about undergraduate alumni, course news from graduate alumni, the departments and faculty; and features news articles, puzzles and advertising of interest to the MIT community. A complimentary subscription is extended to all alumni. For more information, please call 617-475-8000 or visit [www.technologyreview.com](http://www.technologyreview.com).

## Quick Reference Guide to Alumni Programs and Services

Academic Departments	617-253-8217	<a href="http://alum.mit.edu/graduate-alumni">alum.mit.edu/graduate-alumni</a>
Affinity Groups	617-452-3686	<a href="http://alum.mit.edu/affinity/index.html">alum.mit.edu/affinity/index.html</a>
Alumni Interfraternity Council	617-253-0708	<a href="http://web.mit.edu/slp/fsilgs/">web.mit.edu/slp/fsilgs/</a>
Alumni Fund	617-253-0129	<a href="http://web.mit.edu/giving/">web.mit.edu/giving/</a>
Alumni Address Updates	617-253-8270	<a href="http://alum.mit.edu/help/howdoi.html">alum.mit.edu/help/howdoi.html</a>
Alumni Career Services	617-258-8242	<a href="http://alum.mit.edu/cs/index.html">alum.mit.edu/cs/index.html</a>
Alumni Volunteer Connection	617-452-3725	<a href="http://alum.mit.edu/gv/volunteer">alum.mit.edu/gv/volunteer</a>
Athletic Card	617-258-6199	<a href="http://web.mit.edu/mitcard/getcard.html">web.mit.edu/mitcard/getcard.html</a>
Class Activities	617-253-7558	<a href="http://alum.mit.edu/classes">alum.mit.edu/classes</a>
Club Activities	617-253-8205	<a href="http://alum.mit.edu/Clubs">alum.mit.edu/Clubs</a>
Educational Council	617-253-3354	<a href="http://web.mit.edu/admissions/www/educoun/">web.mit.edu/admissions/www/educoun/</a>
Enterprise Forum	617-253-8237	<a href="http://enterpriseforum.mit.edu/">enterpriseforum.mit.edu/</a>
Infinite Connection	617-253-8245	<a href="http://alum.mit.edu/authentication.vhtml">alum.mit.edu/authentication.vhtml</a>
ICAN	617-253-6378	<a href="http://alum.mit.edu/cs/ican/index.html">alum.mit.edu/cs/ican/index.html</a>
Libraries	617-253-5668	<a href="http://libraries.mit.edu/">libraries.mit.edu/</a>
MIT eProNet	800-726-0280	<a href="http://alum.mit.edu/cs/epronet/index.html">alum.mit.edu/cs/epronet/index.html</a>
MonsterTrak	617-253-4733	<a href="http://web.mit.edu/career/www/students/monstertrak.html">web.mit.edu/career/www/students/monstertrak.html</a>
Off-Campus Housing Office	617-253-1493	<a href="http://web.mit.edu/housing/och/index.html">web.mit.edu/housing/och/index.html</a>
openDoor		<a href="http://alum.mit.edu/ne/index.html">alum.mit.edu/ne/index.html</a>
Registrar (Transcripts)	617-258-4784	<a href="http://web.mit.edu/registrar/www/transcript.html">web.mit.edu/registrar/www/transcript.html</a>
Reunions	617-253-7558	<a href="http://alum.mit.edu/ne/reunions/index.html">alum.mit.edu/ne/reunions/index.html</a>
Sailing	617-253-4884	<a href="http://web.mit.edu/mit-sailing/www/index.shtml">web.mit.edu/mit-sailing/www/index.shtml</a>
Sloan Alumni Relations	617-253-1557	<a href="http://mitsloan.mit.edu/alumni/indexflash.php">http://mitsloan.mit.edu/alumni/indexflash.php</a>
Alumni Education	617-252-1149	
Student Alumni Externships	617-252-1143	<a href="http://alum.mit.edu/students/externships/index.html">alum.mit.edu/students/externships/index.html</a>
Technology Day	617-253-8243	
Tech Talk	617-253-2700	<a href="http://web.mit.edu/newsoffice/techtalk-info.html">web.mit.edu/newsoffice/techtalk-info.html</a>
Technology Review	617-475-8000	<a href="http://www.technologyreview.com/">www.technologyreview.com/</a>
The Coop	800-368-1882	<a href="http://store.thecoop.com/coopstore/estore_mit_home.jsp">store.thecoop.com/coopstore/estore_mit_home.jsp</a>
The Tech	617-253-1541	<a href="http://www-tech.mit.edu/">www-tech.mit.edu/</a>
Travel Program	800-992-6749	<a href="http://alum.mit.edu/lt/travel/index.html">alum.mit.edu/lt/travel/index.html</a>

## APPENDIX

Sample Club Bylaws

Sample Letter Welcome Alumni to Area

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# Sample Club Bylaws

*These bylaws are available in text format via email to [Clubs@mit.edu](mailto:Clubs@mit.edu)*

## BYLAWS OF THE MIT CLUB OF \_\_\_\_\_

### ARTICLE 1. NAME, PRINCIPAL OFFICE AND TERRITORIAL LIMITS

- 1.1 This organization shall be known as the MIT Club of \_\_\_\_\_
- 1.2 The Principal Office of the Club shall be in the area of \_\_\_\_\_. The Club will hold its meetings and conducts its activities in \_\_\_\_\_ or elsewhere as its Board of Directors may select.
- 1.3 The Territorial Limits of this Club shall be coincidental with the \_\_\_\_\_ area as defined by the Association of Alumni and Alumnae of MIT in Cambridge, Massachusetts, and may be adjusted from time to time by said Association.

### ARTICLE II. NATURE, OBJECTS & PURPOSES

- 2.1 The MIT Club of \_\_\_\_\_ shall be a nonprofit, educational organization, and no parts of its funds or property shall ever be used, expended or conveyed for the personal or individual benefit of any member; nor shall any member ever have any right, title, claim or interest to any such funds or property by virtue of his/her membership.
- 2.2 The purposes for which the Club is organized are to:
  - 2.2.1 Develop and sponsor activities for the alumni of the Massachusetts Institute of Technology who work or reside in the Club area.
  - 2.2.2 Offer stimulating programs and activities to MIT alumni, their families, friends, parents or students and others.
  - 2.2.3 Provide a communications link between alumni and MIT for a maximum flow of ideas, information and services. Inform alumni about MIT's changing academic programs, residential environment, and extracurricular activities.
  - 2.2.4 Encourage alumni in financial support of MIT, broad participation in alumni activities, and alumni involvement in MIT related volunteer activities.
  - 2.2.5 Cooperate with the Massachusetts Institute of Technology in recruiting students and promoting its reputation.
  - 2.2.6 Conduct all its activities exclusively for educational purposes within the meaning of Section 501 (c) (3) of the Internal Revenue Code of 1954, as the same may be amended from time to time.

### ARTICLE III. DUES MEMBERSHIP

- 3.1 Membership shall be restricted to alumni, parents of current students, spouses of deceased alumni and designated affiliates of the Massachusetts Institute of Technology of Cambridge, Massachusetts.
- 3.2 Members of the MIT Club of \_\_\_\_\_ are those people who work or reside within the territorial limits of the Club and who pay the annual dues.
- 3.3 Any member may resign his/her membership by so notifying the Secretary in writing, but will be expected to make all contributions due prior to such resignations. Whole or pro-rated rebates of dues shall not be given in the cases of such resignations or removal.

#### **ARTICLE IV. BOARD OF DIRECTORS**

- 4.1 The business, property, and affairs of the Club shall be managed and controlled by the Board of Directors (the Board).
- 4.2 The Board shall consist of up to twenty, of which at least five will form the Executive Committee (The committee)
- 4.3 The Committee shall consist of at least the President, President-Elect, Vice President of Programs, Vice President of Communications, Vice President of Membership, Secretary, and Treasurer.
- 4.4 The Committee shall meet at such times and places as designated by the President. Three members of the Committee shall make a quorum for transaction of business at any meeting, except in the case described in Section 4.5. Decisions shall be made by a majority of those present, except in the case described in Section 4.5.
- 4.5 Any member of the Board may be removed by majority vote of the entire Committee when in their judgment the best interests of the Club would be served thereby.
- 4.6 Any member of the Board may resign his/her position by submitting a written resignation to the Secretary of the Club. Such resignation shall be effective as of the date received by the Secretary of the Club, and shall automatically terminate his/her membership on the Board.
- 4.7 The Board shall elect officers in accord with Article VI.

#### **ARTICLE V. DUTIES OF EXECUTIVE COMMITTEE MEMBERS**

- 5.1 The President shall preside over all meetings, select all committees, except as herein provided, shall be ex-officio Chairperson of the Committee, and shall have such further duties as ordinarily pertain to the office of the president, including but not limited to:
  - 5.1.1 Providing an agenda for the meetings
  - 5.1.2 Acting as official liaison with the Association
  - 5.1.3 Appointing new Directors if needed to fill a vacancy resulting from the resignation or removal of a member
  - 5.1.4 Except as otherwise provided by the Board, he/she shall, with the Treasurer, sign all written contracts and other instruments made or entered into by or on behalf of the Club that have been approved by the Committee
- 5.2 The President-Elect shall preside and take over the duties of the President in his/her absence.
- 5.3 The Vice President of Programs shall work closely with the Vice President of Communications, the Vice President of Membership, and the Treasurer in planning advertising and funding requirements for programs. He/she shall be in charge of all programs presented and shall have the power to create and supervise the work of a Program Committee, a standing committee of the Club. He/she may also create sub-committees as needed.
- 5.4 The Vice President of Communications shall recommend communications strategy, and shall be responsible for maintaining contacts and exchanging information with other area alumni groups. He/she shall work closely with the Vice President of Programs, the Vice President of Communications and the Treasurer in planning advertising and funding requirements for membership. In addition, he/she shall have the power to create and supervise the work of the Membership Committee, a standing committee of the Club.
- 5.5 The Vice President of Membership shall recommend membership strategy, and shall be responsible for maintaining contacts and exchanging information with other alumni groups. He/she shall work closely with the Vice President of Programs, the Vice President of Communications and the Treasurer in planning advertising and funding requirements for membership. In addition, he/she shall have the power to create and supervise the work of the Membership Committee, a standing committee of the Club.

- 5.6. The Secretary shall keep the records of the Club and shall record all meetings of the Executive Committee, including attendance, and actions of the Club.
- 5.7. The Treasurer shall collect all contributions, keep the books and accounts of the Club and shall have custody of all funds of the Club; render periodic reports of the financial condition of the Club as directed by the President; attend to the payment of bills and obligations; and shall have such further duties as ordinarily pertain to the office of the Treasurer. All funds of the Club shall be deposited in the account of MIT Club of \_\_\_\_\_ in a bank designated by the Board of Directors. In addition, he/she shall have the power to create and supervise the work of a Finance Committee, a standing committee of the Club.

#### **ARTICLE VI. NOMINATION & ELECTION OF BOARD & EXECUTIVE COMMITTEE MEMBERS**

- 6.1 All Executive Committee members shall be elected for a term of one year, and Board members to a term of two years. Elections are to be held at the annual meeting of the Board before June of each year. The term of office of each officer shall begin on the first day of July of each year, and shall end on the last day of June of the succeeding year.
- 6.2 Nomination for elections shall be made by a nominating committee appointed by the President at least two months prior to the election. This committee shall consist of three Active members and shall present its report at the Board meeting prior to the Board meeting at which the election is to take place. It shall nominate one candidate for each of the offices. Further nominations may be made from the floor at any Club meeting or by letter to the Secretary in the two months prior to the elections.
- 6.3 The Committee shall fill any vacancies in office at a meeting of the Board called upon with at least a one-week notice, which notice shall state the purpose of the meeting. Any member elected to fill a vacancy shall serve for the remainder of the unexpired term.

#### **ARTICLE VII. BOARD OF ADVISORS (OPTIONAL)**

- 7.1 The Board of Advisors shall consist of distinguished alumni or friends of MIT in the Club area who have shown a commitment to the Institute.
- 7.2 Its purpose will be to supply advice to the Board of Directors regarding Club activities, and to provide contacts that will enable the Club to effectively utilize the resources of local institutions.
- 7.3 The Board of Advisors shall be comprised of not less than five members.
- 7.4 Members of the Board of Advisors shall be appointed by the Board of Directors, and shall serve by mutual consent with the Board of Directors.

#### **ARTICLE VIII. AMENDMENT OF THE ARTICLES & BYLAWS**

- 8.1 The power to alter, amend, or restate the bylaws shall be vested in the Board. Such action may be taken by vote of the majority of a duly constituted quorum of the Board present at any regular or special meeting.
- 8.2 Notice of intent to alter, amend, or restate the bylaws must be given by the Board to the dues paying membership at least two weeks prior to any vote by the Board regarding such alteration, amendment, or restating. Such notice shall also state the date, time, and location of the Board meeting at which such matters will be discussed and voted upon.

**ARTICLE IX. REVENUES**

- 9.1 The annual dues rate shall be set from time to time by the Board.
- 9.2 Dues membership in the Club shall begin in the first day of July and end on the last day of June in the succeeding year. Any dues paid shall apply only to the specified term.

**ARTICLE X. MISCELLANEOUS**

- 10.1 No member or officer of the Club shall be personally liable on any contract entered into by the Club or because of any act or thing done or omitted to be done on behalf of or in the name of the Club.
- 10.2 In the event of dissolution of the Club, any and all of the assets of the Club shall be turned over to the MIT Alumni Association in Cambridge, Massachusetts.

These bylaws have been approved by the Board of Directors of the MIT Club of \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

## Sample Letter of Welcome to Alumni Moving to Area

Dear MIT Alumnus/a:

According to MIT's records, you have recently (relocated to or within the \_\_\_\_ area. If you have moved from outside the area or have just graduated, welcome to \_\_\_\_ and the Club of \_\_\_\_\_. If your move was within the area, I hope you will take a few minutes to reacquaint yourself with the Club's programs and activities.

As a focal point for alumni activities in the greater \_\_\_\_\_ area, the MIT Club of \_\_\_\_\_ presents an array of stimulating events for learning, entertainment, forging new friendships, and catching up on old ones. Some of our activities include:

- dinner meetings with a local or an MIT speaker
- holiday luncheon with MIT undergraduates who are home or on semester break
- summer picnic
- special interest activities for the sports-minded, families, and entrepreneurs
- coordinating with local Educational Counselors to welcome the newly admitted students each spring
- raising funds for our annual scholarship award to a local student

As a dues-paying Club member, you will regularly receive news of our events and will be eligible for reduced rates for general Club activities. Our annual dues are \_\_\_\_\_ and our membership year runs from \_\_\_\_\_ to \_\_\_\_\_. To join, simply complete the enclosed coupon. If you have questions about the Club, please feel free to call me at \_\_\_\_\_.

We hope to see you at some future events!

President/Secretary/Membership Chairperson

## Sample Thank You Letter to Faculty Speakers

Dear \_\_\_\_\_:

On behalf of the MIT Club of \_\_\_\_\_, I want to thank you for speaking to our group on \_\_\_\_\_. It is always a special pleasure to have an MIT faculty member as our speaker. We very much appreciate your taking the time to join us and bring us a bit closer to the work currently going on at the Institute.

Our alumni are one of the best vehicles for promoting support of MIT. Again, thank you for sharing your time with us.

Sincerely yours,

President or VP of Programs

# Volunteer Job Description

MIT Club of \_\_\_\_\_

Title: **PRESIDENT**

General Description: The President is the chief officer of the Club, setting annual objectives and goals and ensuring achievement of said goals. The President should be responsible for volunteer cultivation.

Specific Tasks and Duties: Convenes, sets agenda and presides over all Board Meetings  
Supervises the Vice Presidents and ensures that their plans are carried out effectively  
Selects committees and appoints chairs  
Acts as the primary liaison with the Alumni Association and the Alumni Affairs Officer  
Completes Alumni Association Annual Report  
Attends Alumni Leadership Conference or ensures Club participation

Expected Outcomes: A goal of \_\_\_\_\_ dues-paying members is set for FY \_\_\_\_\_  
A goal of \_\_\_\_\_ events is set for FY \_\_\_\_\_  
A goal of \_\_\_\_\_ volunteers is set for FY \_\_\_\_\_  
The Board of Director must meet at least four times annually, with a minimum of \_\_\_\_\_ members.

Training and Support: The President reports to the Board of Directors  
The President will receive training from the Immediate Past President  
The President may seek consultative advice and guidance from the assigned Alumni Affairs Officer

Time Commitment: The President position requires a time commitment of 4 to 6 hours per week

Qualifications: The President must be a current member of the Club. Prior leadership in the Club at the VP level is preferred. Multiple alumni contacts in the area and strong networking skills are helpful

Benefits: High visibility position with MIT Club. Access to MIT materials for Club officers such as the Club and Regional Program *Focus*

# Volunteer Job Description

MIT Club of \_\_\_\_\_

Title: **VICE PRESIDENT OF MEMBERSHIP**

General Description: The Vice President of Membership establishes and executes an annual membership solicitation plan for the recruitment and retention of dues-paying members

Specific Tasks and Duties: Recruits and trains volunteers for the membership Committee. Convenes, sets agenda and presides over Membership Committee Meetings. Along with other Club leaders and Membership Committee, sets annual goal for dues-paying members, usually a minimum of 10% of local alumni population. Prepares annual membership renewal and acquisition appeal letters and forms, creates membership dues on SmarTrans™ plans for member form inclusion in other Club communications such as newsletter or email listserv, submits budget requirements for mailing and projection of income to Treasurer. Prepares annual local Alumni directory, a benefit of membership. Regularly provides the Alumni Association with lists of dues-paying members and address updates.

Expected Outcomes: A goal of \_\_\_\_\_ dues-paying members is set for FY \_\_\_\_\_. The Membership Committee must meet at least four times annually, with a minimum of \_\_\_\_\_ members.

Training and Support: The VP of Membership is a direct report to the President  
The VP of Membership will receive training from the prior VP, along with assistance from the President and Treasurer  
The VP of Membership may seek consultative advice and guidance from the assigned Alumni Affairs Officer  
Member updates can be sent to Marilyn Finlay ([mfinlay@mit.edu](mailto:mfinlay@mit.edu)) Lists and labels are available on line at <https://ans.mit.edu/user/label/select.jhtml> or request by contacting your Alumni Affairs Officer.

Report Dates: The VP of Membership is expected to deliver a verbal/written membership status report at Board Meetings to be held on the following dates: \_\_\_\_\_. Should he/she be unable to attend, a written report must be submitted.

Time Commitment: The VP of Membership position requires a time commitment of 3 to 5 hours per week

Qualifications: The VP of Membership must be a current member of the Club. A general understanding of direct mail/member solicitation is preferred. Multiple alumni contacts in the area and strong networking skills are helpful

Benefits: High visibility position with MIT Club. Access to MIT materials for Club officers such as the Club and Regional Program *Focus*. Position normally succeeds to VP of Programs or President-Elect.

# Volunteer Job Description

MIT Club of \_\_\_\_\_

- Title:** **VICE PRESIDENT OF PROGRAMS**
- General Description:** The Vice President of Programs establishes and executes annual program plan for the number and type of events the Club will host
- Specific Tasks and Duties:** Recruits and trains volunteers for the program Committee(s) and subcommittees as needed  
Convenes, sets agenda and presides over Program Committee Meetings  
Along with other Club leaders and Program Committee, sets annual goal for the number and type of events the Club will hold  
Annually submits requests for MIT faculty speakers to the Alumni Association Alumni Education  
Prepares any event announcements as needed, submits budget requirements for events and projection of income to Treasurer  
Registers events on SmarTrans™ or oversees registration process  
Annually provides the Alumni Association with lists of events and the number of attendees at each event
- Expected Outcomes:** A goal of \_\_\_\_\_ events is set for FY \_\_\_\_\_  
The Program committee must meet at least four times annually, with a minimum of \_\_\_\_\_ members.
- Training and Support:** The VP of Programs is a direct report to the President  
The VP of Programs will receive training from the prior VP, along with assistance from the President and Treasurer  
The VP of Programs may seek consultative advice and guidance from the assigned Alumni Affairs Officer
- Report Dates:** The VP of Programs is expected to deliver a verbal/written of both past (results) and upcoming (plans) events at Board Meetings to be held on the following dates: \_\_\_\_\_. Should he/she be unable to attend, a written report must be submitted.
- Time Commitment:** The VP of Programs position requires a time commitment of 3 to 5 hours per week
- Qualifications:** The VP of Programs must be a current member of the Club. Past planning experience of an MIT Club event is preferred. Multiple alumni contacts in the area and strong networking skills are helpful
- Benefits:** High visibility position with MIT Club. Access to MIT materials for Club officers such as the Club and Regional Program *Focus*. Position normally succeeds to VP of Membership or President-Elect

# Volunteer Job Description

MIT Club of \_\_\_\_\_

Title:	<b>VICE PRESIDENT OF COMMUNICATIONS</b>
General Description:	The Vice President of Communications will be responsible for creating lines of communication between the Board and the alumni living in the Club area.
Specific Tasks and Duties:	Develops mailing schedule in conjunction with the Club Program Committees Maintains records of Club's U.S. Postal mailing indicia (if one exists) Determines production procedures for Club mailings Responsible for production and maintenance of Club Web site Serves as editor for the Club email list Creates a Communications subcommittee as needed, members of the subcommittee may include the Club webmaster, email list editor, newsletter editor
Expected Outcomes:	The Communications Committee must meet at least four times annually, with a minimum of _____ members.
Training and Support:	The VP of Communications is a direct report to the President The VP of Communications will receive training from the prior VP, along with assistance from the President and Treasurer The VP of Communications may seek consultative advice and guidance from the assigned Alumni Affairs Officer
Report Dates:	The VP of Communications is expected to deliver a verbal/written of both past (results) and upcoming (plans) events at Board Meetings to be held on the following dates: _____. Should he/she be unable to attend, a written report must be submitted.
Time Commitment:	The VP of Communications position requires a time commitment of 3 to 5 hours per week
Qualifications:	The VP of Communications must be a current member of the Club. Past planning experience of an MIT Club event is preferred. Multiple alumni contacts in the area and strong networking skills are helpful
Benefits:	High visibility position with MIT Club. Access to MIT materials for Club officers such as the Club and Regional Program <i>Focus</i> . Position normally succeeds to VP of Membership or President-Elect

# Volunteer Job Description Worksheet

**Position Title:**

**Description of the Project/Purpose of Assignment:**

**Outline of Volunteers Responsibilities or Lists of Tasks:**

**Outcome/Goals:**

*How will the volunteer know that the job is being done well, or that the project is successful?*

**Training and Support Plan:**

*How will the volunteer be prepared for the work and oriented to the Club? Who will supervise/be the contact person?*

**Reporting:**

*What reports will be expected, in what form and how often?*

**Time Commitment:**

*Minimum hours per week/month? On any special schedule? For what duration of time?*

**Qualifications Needed:**

**Benefits:**

*What will the volunteer get in exchange for service (tangibles and intangibles)?*

## EVENT BUDGETS

A budget worksheet can be very helpful in planning for an event (note sample worksheet at the end of this section). Copy it for each program and distribute copies to event chairs. This worksheet is very easy to use and can be helpful especially to those who have not planned an event before.

Complete the "fixed costs" column first. These are the costs the event will incur regardless of how many people attend. By calculating this total and dividing it by the number of attendees (be sure to use a conservative estimate) you will know the cost you must add to any other per person costs. Be careful to add only those costs that will NOT change to the fixed costs column. The more costs you calculate on a per person basis, the more accurate your budgeting and per person cost will be.

## EVENT BUDGET WORKSHEET

Event: \_\_\_\_\_ Date: \_\_\_\_\_  
Based on \_\_\_\_\_ number of attendees.

	Variable Cost (per person)	Fixed Cost
Location rental		
-Equipment		
-Tables and Chairs		
-Tablecloths		
-Canopies		
-Garbage Cans		
-Coat Check		
-Parking		
-Security		
-A/V Equipment		
-Other:		
Food (include tax and tip):		
-Hors d'oeuvre		
-Meals		
Bar		
-Bartender Charge		
-Hosted Bar		
-Wine (tax and tip)		
-Bottles/carafes		
-By the glass		
Music		
Entertainment		
Flowers		
Balloons/decorations		
Favors/souvenirs		
Miscellaneous		
Include mailer costs if appropriate		
Totals:		

# of attendees planned \_\_\_\_\_ x per person costs \$ \_\_\_\_\_ = \_\_\_\_\_

Fixed costs/# attendees = \_\_\_\_\_

**Name of Event:** \_\_\_\_\_

**Date & Time of Event:** \_\_\_\_\_

**Event Planner:** \_\_\_\_\_

**Planner's Phone Numbers: Home** \_\_\_\_\_ **Work** \_\_\_\_\_

**Anticipated Attendance:** \_\_\_\_\_ **Maximum Attendance** \_\_\_\_\_

**Event Location:**

1. Address of Event \_\_\_\_\_

2. Is a contract required to use this location? YES NO  
If yes, do you want to have contract reviewed by a local professional? YES NO

3. Does the location need a special set up? YES NO  
If yes, who will do the set up? \_\_\_\_\_  
Describe the set up \_\_\_\_\_

4. Is any special equipment needed? YES NO If yes, please circle what equipment

\_\_\_\_ Podium    \_\_\_\_ table    \_\_\_\_ microphone    \_\_\_\_ slide projector    \_\_\_\_ LCD projector  
\_\_\_\_ Screen    \_\_\_\_ TV/VCR  
\_\_\_\_ Water for speaker    \_\_\_\_ other

Arrangement for obtaining the equipment:

5. Is the location handicapped accessible? YES NO  
Please be sure to check the entrance to the building and room, and the locations of special telephone and rest room facilities.

**Guest Speaker(s)**

1. Name(s) of guest speaker(s): \_\_\_\_\_

2. Is a contract required for the services of the guest speaker? YES NO If yes, do you want to have the contract reviewed by a local professional? YES NO

3. Does the speaker have any special needs? YES NO If yes, how will those needs be fulfilled?

4. Who will meet, greet and escort the speaker? \_\_\_\_\_

5. Who will thank speaker and present gift? \_\_\_\_\_

### **Food and Drinks**

1. Will food and/or drinks be provided at the event? YES NO

If yes, what food and drinks? \_\_\_\_\_

Who is the caterer? \_\_\_\_\_

Caterer's Address \_\_\_\_\_

Caterer's Number \_\_\_\_\_

Is a catering contract required? YES NO If yes, do you want to have the contract reviewed by a local professional? YES NO

### **Insurance**

1. Is insurance coverage required for this event? YES NO

2. If insurance is required, you should have the contract reviewed by a local professional to determine if additional coverage is desirable.

### **Hospitality**

1. How many greeters are needed?

2. Special instructions for greeters:

3. Items needed for the event:

- Attendance list (pre-registrations)
- Attendance Sign-In Sheet
- Banner
- Evaluation Cards
- Masking Tape
- Nametags
- Pens
- Other:

4. Special Notes for Hospitality Committee

**EVENT FINANCE REPORT**

Please send to the Treasurer all of the checks, expense invoices/receipts, and this finance report form. Do not enclose cash. Keep the cash and write a personal check for the amount of the cash to the MIT Club of \_\_\_\_\_ . Do not offset your out of pocket expenses with cash receipts – we need an accurate accounting/audit trail of income and expenses. If you need assistance, please contact the Treasurer.

Treasurer Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 Telephone Number \_\_\_\_\_  
 Fax Number \_\_\_\_\_  
 Email Address \_\_\_\_\_

Event Organizer \_\_\_\_\_  
 Name of Event \_\_\_\_\_  
 Date of Event \_\_\_\_\_  
 Number of Attendees \_\_\_\_\_  
 Total income \_\_\_\_\_  
 Number of checks enclosed \_\_\_\_\_

Itemized expenses: clearly indicate which of the invoices have already been paid and which should be paid directly. Make sure you provide the amount and the mailing address for each reimbursement.

Expense	Amount	Paid	Unpaid

Total Event Costs \_\_\_\_\_

Event reserves (income-expenses): \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

