

AL

Mit

Alumni  
Leadership  
Conference

# Introduction to Hivebrite

Kim Farino, Senior Associate Director of Technical Project Management

Kim Balkus, Director Association Advancement Services

Volunteer Panel:

David Johnston '73, PhD '79, MIT Club of South Texas

Linda Custer '83, MIT Club of Boston

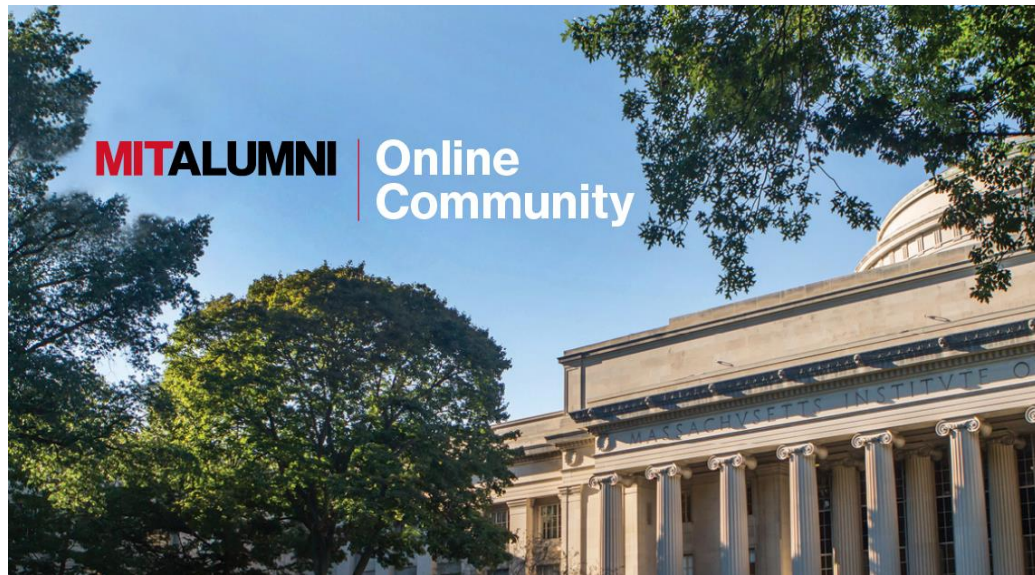
Brian Hughes '71, MIT Club of Cape Cod

# Agenda

- Migration Plan
- Early Adopters
- Volunteer Panel
  - David Johnston '73, PhD '79, MIT Club of South Texas
  - Linda Custer '83, MIT Club of Boston
  - Brian Hughes '71, MIT Club of Cape Cod
- Q&A

# MIT Alumni Online Community

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- New home for the more than 200 volunteer-led clubs, classes, and groups
- Powered by Hivebrite
- Launched early September

# Migration Plan

- Fall 2023 – June 2024: All Encompass sub-communities are migrating to the MIT Alumni Online Community platform
- Schedule link - <https://alum.mit.edu/about/alumni-online-community>
- Why we are moving:
  - Selected platform following a successful pilot that included extensive user experience-testing with several of your peer volunteers and our staff super-users
  - Simple, intuitive interface provides a user-friendly platform
  - Easier ways to connect with fellow alumni across communities
  - New opportunities for sharing content, ideas, knowledge, and networking

# Migration Plan

- **Phase 1: Pre-Migration Preparations**
  - Collect info about your current Encompass site
  - Training and admin access to edit Hivebrite site
  - Import your past event detail pages and membership form
  - Export of photos and documents provided in Dropbox
- **Phase 2: The Migration Process**
  - Encompass membership form disabled
  - Import your data into your new Hivebrite group
  - MIT Alumni Association will send your launch email
- **Phase 3: Post-Migration Optimization**
  - Encompass site updated with a redirect link for users to the new Hivebrite site
  - Continue to have Encompass admin access

# Project Team

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## **Core Team**

Christine Tempesta (Sponsor)  
Kim Farino (Project Manager)  
Sonal Rossi  
Kim Balkus  
Nora Zheng  
Tim Mansfield  
Alex Barber  
Emily Dufresne  
Joe Xu  
Dave Pires

## **Alumni Engagement Team**

Tim Mansfield (Lead)  
Amy Davis  
James Hayward  
Lizzie Army  
Leah Ofsevit  
Kim Hunter  
Emily Taylor

## **Marketing Team**

Alex Barber (Co-Lead)  
Em Dufresne (Co-Lead)  
Tim Mansfield  
Russell Boulais  
Mary Zyskowski  
Jay London  
Kim Balkus  
Brian Geer

## **Technical Team**

Joe Xu (Lead)  
Dave Pires  
Chia-Ying (David) Yang  
Sharon Xu (consultant)  
Daniel Ruan (consultant)

## **Training Team**

Kimberley Balkus (Lead)  
Tim Mansfield  
Kim Farino  
Alex Barber  
Nora Zheng

## **Early Adopter Team**

Kimberley Balkus (Lead)  
60+ alumni volunteers (25 groups)  
Bob Schaffel '71 (Hivebrite Mentor)  
Coleen Smith '87 (Hivebrite Mentor)

## **Additional Contributors:**

Helena Sebastian  
Elyssa Sykes Bidwell

# Kim Balkus

Early Adopters Team Lead



# Early Adopters

- 25 groups with 60+ alumni volunteers
- Provided feedback to streamline migration process for all groups
- Groups launched in early September on Hivebrite

# Hivebrite Early Adopter Groups

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- Arab Alumni Association
- Association of MIT Alumnae
- MITAS - MIT Alumni Startup Network
- MIT Club of Austin and San Antonio
- MIT Club of Boston
- MIT Club of Montreal
- MIT Club of Cape Cod
- MIT Club of Colorado
- MIT Club of Hartford
- MIT Club of New York
- MIT Club of Northeast Ohio
- MIT Club of Northern California
- MIT Club of Princeton
- MIT Club of Rochester
- MIT Club of San Diego
- MIT Club of South Texas
- MIT Club of Southern California
- MIT Club of Southwest Florida
- MIT Club of Washington DC
- MIT Club of Wisconsin
- MIT Crew Alumni Association
- MIT Sloan Club of San Diego
- MIT10
- MIT Class of 1971
- MIT Class of 1998

**David Johnston '73, PhD '79**

MIT Club of South Texas

# Welcome to the Club of South Texas Homepage

**MITALUMNI**

Home Alumni Groups All Events About Alumni Directory Give Admin Panel

MIT Club of South Texas Manage group


MIT Club of South Texas +98 Joined

Home About Us Join or Renew News Events Connect Volunteer Resources Media center

## Welcome!

The MIT Club of South Texas (MITCoSTx) is a volunteer organization run by and for the alumni of the Massachusetts Institute of Technology living and working in the greater Houston area and surrounding counties – stretching from Beaumont to the east, Lufkin to the north, College Station to the west and Galveston to the south. The Club's mission is to promote communication and cooperation between MIT and South Texas MIT community. We also develop and sponsor activities/programs for MIT alums and parents of MIT students and alums who work or reside in the South Texas area. In addition, the Club promotes math, science, engineering, and general technology literacy in the South Texas area.

About us



# Welcome to the Club of South Texas Homepage



## Volunteer

Consider getting involved, gain leadership skills, and make new friends along the way.



## Leadership

Interested in a leadership role with the Club of South Texas or have questions? Contact the [Club president](#).

## Join us

When you support the MIT Club of South Texas by becoming a member you help the club do a better job of supporting you. We'd love to have you join us. We also encourage parents of MIT students to join and participate in the Club's events.

Benefits of membership include free or discounted admission to club events. But your membership also helps the Club promote math, science, engineering, and general technology literacy in the South Texas.

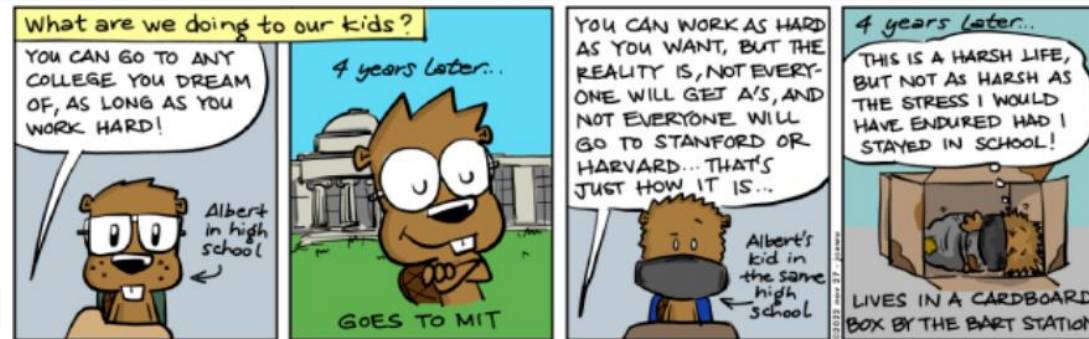
Membership in the MIT Club of South Texas is on a calendar year basis. A reminder is sent the first of each year. Or sign up for auto renewal.

[Become a member](#)



# Welcome to the Club of South Texas Homepage

## Brass Rats



The Brass Rats comic strip is the brainchild of MIT alumna, Jessica Wu Ramirez, SB '99, of the MIT Club of Northern California.

## Brass Rats Archive

## Events (3)

[See all](#)



### InterClub Social - September 28

Date: September 28, 2023 6:00 PM - 8:00 PM...  
Location: 717 Rochrow, Houston, TX, USA...

Affiliate Event Social



### Private: Conner 3 '68-'82 Alumni get together

Date: September 30, 2023 11:30 AM - 2:00 P...  
Location: 410 Memorial Dr, Cambridge, MA...

E B D W ±12




### Make your own Glass Pumpkin!

Date: October 14, 2023 10:00 AM - 12:00 PM...  
Location: 17443 FM 2920, Tomball, TX 77377...


In-Person Learn Social

# Welcome to the Club of South Texas Homepage


News (12) [See all](#)



**MIT Grad leads SpaceX Crew-7 mission to the ISS**  
August 27, 2023  
South Texas resident Jasmin Moghbeli '05 leads the 6-month scientific mission which launched August 26, 2023.



**MITeI membership**  
April 25, 2023  
The MIT Club of South Texas has renewed its affiliate status with the MIT Energy Initiative.



**Marvin Baker**  
April 24, 2023  
The MIT Club of South Texas is saddened to announce the passing of Marvin L. Baker '51, SM '53 and SCD '56.

Questions?  
Contact the Club President at [stexasclubpres@alum.mit.edu](mailto:stexasclubpres@alum.mit.edu)

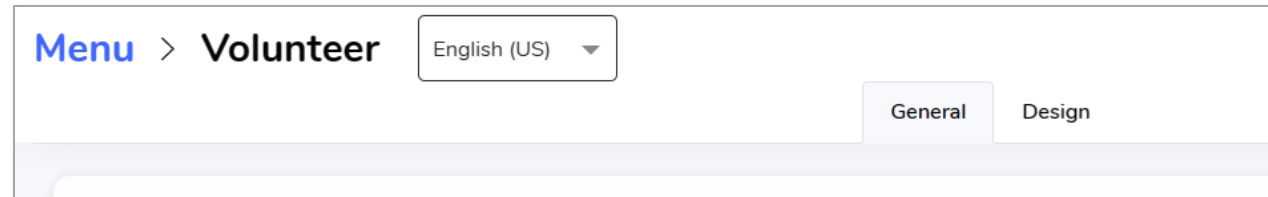
“As an MIT10, I find that the new website is really attractive. It makes the Club seem active and up-to-date. I especially like when there are pictures from past events so I can gauge that there will probably be lots of people my age at upcoming ones.”

Mary Spangers '18



# Preparing for Migration (1)

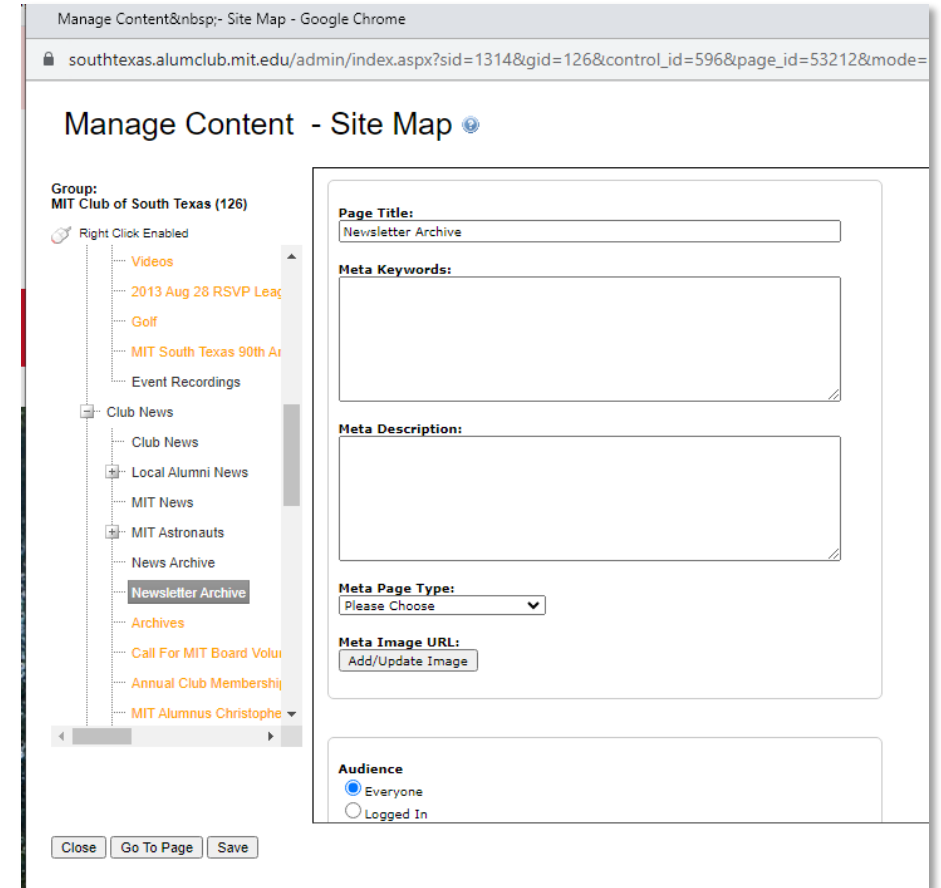
- Understand Hivebrite terms and concepts
  - Public: Web pages, events or news items visible to anyone
  - Front office: Content visible to those logged in using their IC credentials
  - Back office: Set of development tools accessible to authorized administrators
  - Campaigns: Emails
  - Pages are defined by “General” information and edited in “Design”



- Publication: Content is not visible in public or front office pages unless “published” in the back office (includes sub tabs and event custom tabs)
- No autosave – save, save, save!

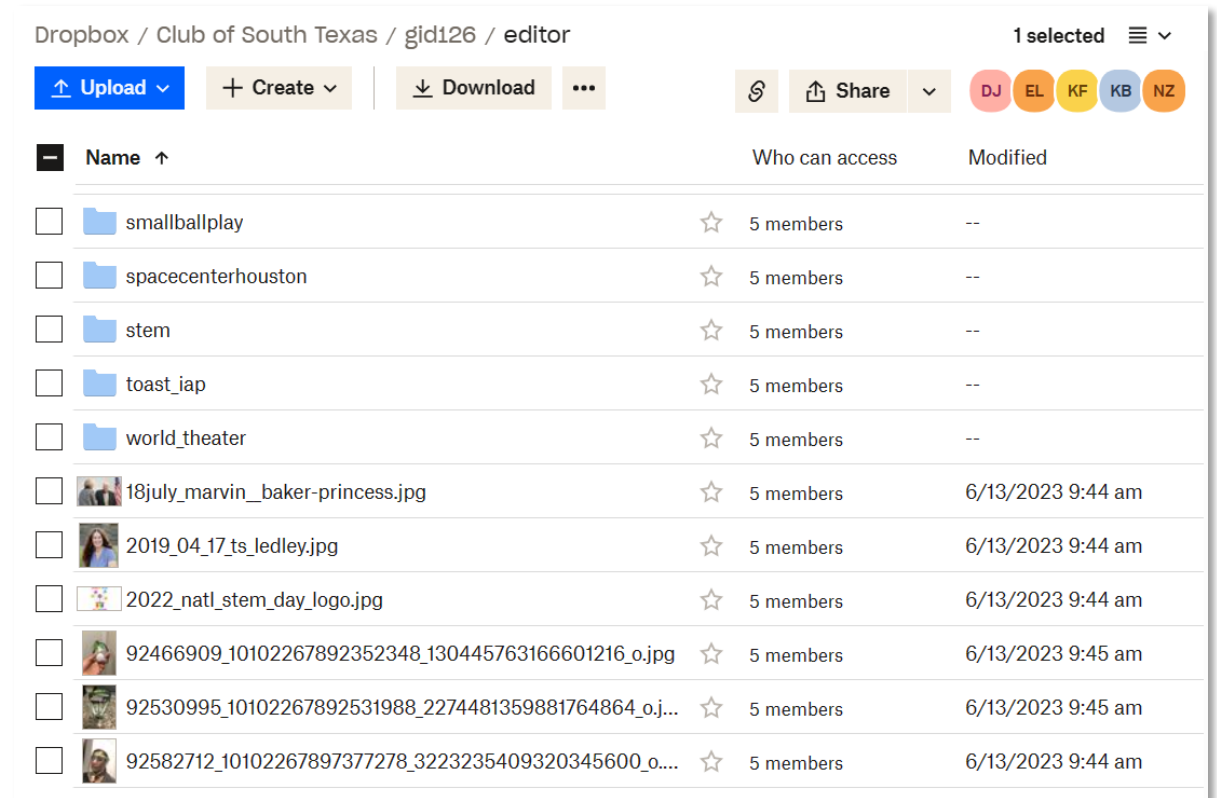
# Preparing for the Migration (2)

- Understand the contents of your current Encompass site
  - The dreaded site map is your friend!
  - Look for hidden pages
  - Some pages may not be needed in Hivebrite
    - Event archive
    - Event calendar
    - News archive
- Prioritize pages for migration
  - About us
  - Volunteer



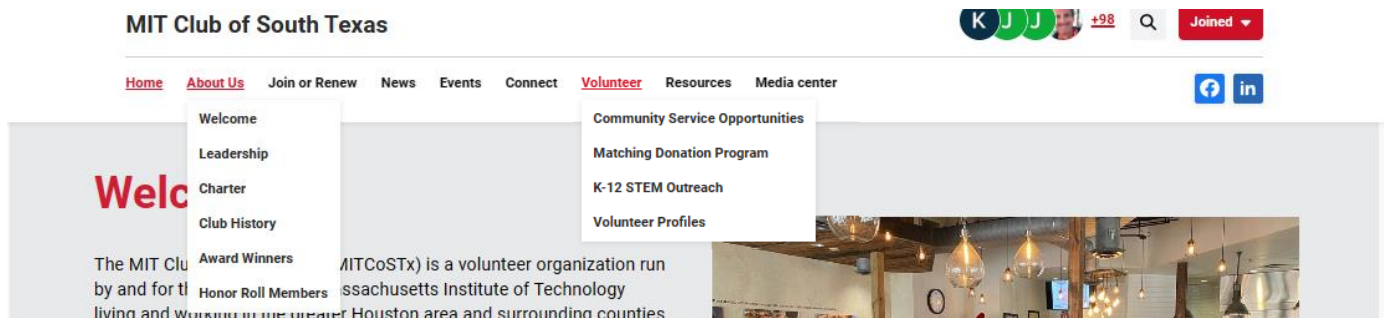
# Preparing for Migration (3)

- Collect images from the old site
  - Image and documents will be downloaded to a Dropbox
  - Save locally or on your Club or Group cloud storage
- Explore “Unsplash” library images
- Find other images for covers and banners
  - Wide: 1143x260px (ratio 4.40)
  - Narrow: 757x418px (ratio 1.81)
  - Events: 1352x698px (ratio 1.9)



# Preparing for Migration (4)

- Map Encompass tabs and sub-tabs to Hivebrite
  - Tabs in Hivebrite not limited to 6



# Content Migration

- Re-create old content in Hivebrite – add hidden pages

The screenshot shows the Hivebrite interface for the MIT Club of South Texas. The top navigation bar includes: Members & Prospects, Engagement scoring, Memberships, Events, News, Campaigns, Media center, Forums, Group tabs, and Settings. The 'Group tabs' tab is active, displaying a list of pages:

- Volunteer (12) [Edit]
- Community Service Opportunities [Edit]
- Board roles and responsibilities [Edit]
- Matching Donation Program [Edit]
- Generate HTML for Matching Donation accordion menu (hide) [Edit]
- K-12 STEM Outreach [Edit]
- LEAP Program [Edit]
- Science and Engineering Fair [Edit]
- FIRST Robotics [Edit]
- Science Olympiad [Edit]

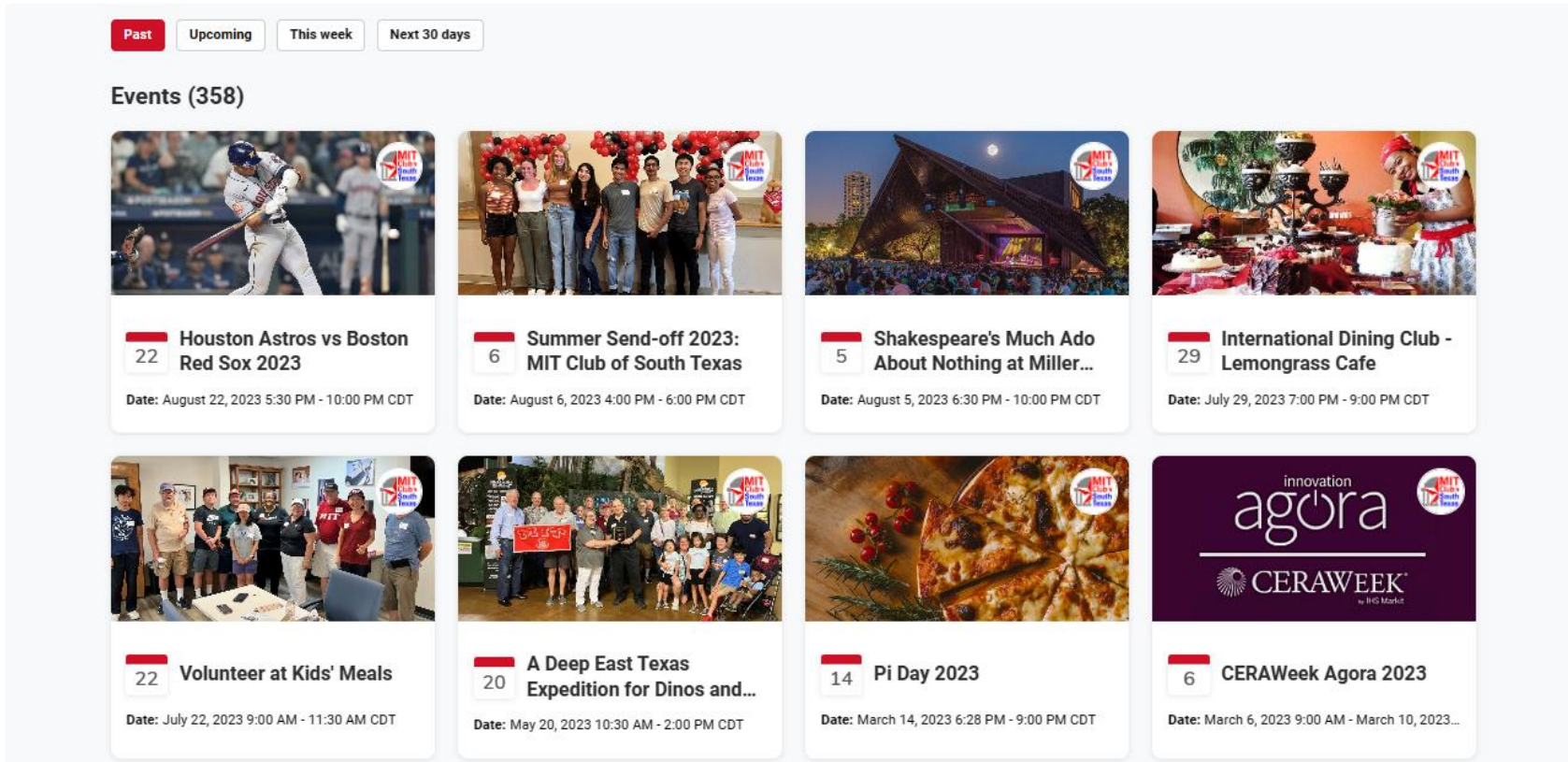
An inset window titled 'Page visibility & restrictions' is overlaid on the left. It contains the following settings:

- Publication status: Published
- Page visibility: Public pages and front office
- Display as a tab in front office
- Display as a tab in public pages

The two checkboxes at the bottom of the inset are circled in red. Below the inset, the text 'Uncheck to hide pages' is written in red.

# Past Events Migration

- Past events are migrated to Hivebrite for you
  - Banner image will be default to narrow cover image
  - Consider replacing banner image for each event



The screenshot displays a Hivebrite event calendar interface. At the top, there are filter buttons: 'Past' (highlighted in red), 'Upcoming', 'This week', and 'Next 30 days'. Below the filters, the text 'Events (358)' is shown. The main content area features a grid of eight event cards, each with a banner image, a date, a title, and a date range. Each card also includes a small MIT Club of South Texas logo in the top right corner of the banner image.

Event Title	Date	Time
Houston Astros vs Boston Red Sox 2023	August 22, 2023	5:30 PM - 10:00 PM CDT
Summer Send-off 2023: MIT Club of South Texas	August 6, 2023	4:00 PM - 6:00 PM CDT
Shakespeare's Much Ado About Nothing at Miller...	August 5, 2023	6:30 PM - 10:00 PM CDT
International Dining Club - Lemongrass Cafe	July 29, 2023	7:00 PM - 9:00 PM CDT
Volunteer at Kids' Meals	July 22, 2023	9:00 AM - 11:30 AM CDT
A Deep East Texas Expedition for Dinos and...	May 20, 2023	10:30 AM - 2:00 PM CDT
Pi Day 2023	March 14, 2023	6:28 PM - 9:00 PM CDT
CERAWEEK Agora 2023	March 6, 2023	9:00 AM - March 10, 2023...

# Past News Item Migration

- Past news items are not migrated and must be entered manually
  - Copy and paste from old website, add banner image
  - Set original publication date

Publication

Post to all related Groups news list(s)

Public

Highlight in related Groups News list(s)

Publication settings ←

Date and time (MM/DD/YYYY) \*

Timezone \*

Home About Us Join or Renew **News** Events Connect Volunteer Resources Media center

Search by keyword

Publication date (From - To) (MM/DD/YYYY)

Results (12) Sort by: Newest

**MIT Grad leads SpaceX Crew-7 mission to the ISS**  
August 27, 2023  
South Texas resident and NASA astronaut Jasmin Moghbeli (05, Aerospace Engineering) is spacecraft commander of the SpaceX Crew-7...

**MITei membership**  
April 25, 2023  
As a result of the fantastic turnout for CERAWeek this year, the MIT Club of South Texas has been able to renew its affiliate status with the MIT Energy...

**Marvin Baker**  
April 24, 2023  
Long-time club member and member of the MIT Club of South Texas Advisory Board, Marvin Baker passed away on April 6, 2023 at the age of...

**2022 Award Winners**  
December 12, 2022  
2022 MIT Club of South Texas Annual Awards At the annual holiday party on December 11, 2022, Club president Farrah Sabouni announced the...

# Memberships Migration

- Migration of membership data and creation of the membership page is handled by MITAA
- You may find that membership category names change in order to be consistent across all the Clubs and Groups
- You can add descriptions for each category
- Two options because one is auto-renewal

**Sustaining**

This Honor Roll membership includes Regular annual dues and a contribution to further support the Club of South Texas' mission. Honor Roll memberships are recognized on the Club website....

[Read more](#)

**Payment options:**

- \$100 / 1 year
- \$100 / 1 year

✔ You have already acquired this membership  
[Manage your memberships](#)

**Patron**

This Honor Roll membership includes Regular annual dues and a contribution to further support the Club of South Texas' mission. Honor Roll memberships are recognized on the Club website....

[Read more](#)

**Payment options:**

- \$50 / 1 year
- \$50 / 1 year

[Purchase now](#)

**Regular**

Benefits of Regular membership include free or discounted admission to club events. Plus, you help the Club promote STEM literacy in the South Texas.

**Payment options:**

- \$30 / 1 year
- \$30 / 1 year

[Purchase now](#)



**Linda Custer '83**

MIT Club of Boston

# Most important things to migrate first—to us

- Club mission
- Leadership
- Call to action to join as paid member
- Call to action to join as active volunteer
- Events (will come from Encompass)



## MIT Club of Boston



Home

Home

About Us

Board of Directors

Leadership

News

Memberships

Events

Programs

W  
sh

er, pursue our  
theoretical and

applied learning forward into the world outside MIT. Explore this site and join us.





Home



### Join us!

[Become a member today or check your membership status.](#) Questions? Contact [membership@mitcob.org](mailto:membership@mitcob.org).

(Make sure you are logged in with your MIT Infinite Connection account before accessing the membership page.)



Home

### Leadership

Interested in volunteering with the group or have questions? Contact [Joanna London](#) and the [group leaders](#).

### Events (10)

[See all](#)



#### 28 STEAM Family Night

Date: September 28, 2023 05:00 PM EDT

Location: 122 Cottage St, Boston, MA...

Affiliate Event



#### 29 MIT Alumni Leadership Conference

Date: September 29, 2023 08:00 AM EDT

Location: 77 Massachusetts Ave,...

Affiliate Event



#### 03 From Idea to Operating Venture:...

Date: October 03, 2023 06:30 PM EDT

Location: 77 Massachusetts Ave,...

APWJ +68

In-Person

### News (3)

[See all](#)



# MIT Club of Boston team approach to migration work

- We have approximately 60 volunteer leaders, probably 20 really active
- Maybe 6 or 7 of those actively contribute to posting events on website and administering website
- Decided Club VP of Marketing and Communications would handle migration emails, train with MITAA Hivebrite team, perform migration, then train others
- For 2–4 weeks, one person did all event listing maintenance (still ongoing), but we will soon be back to individuals doing tasks in Hivebrite they used to do in Encompass
- This approach allowed us to find what worked, note where we could enforce consistency, and then train to that consistency
- We disabled forums, but will probably explore that once we have a moderator
- We left memberships alone and will train our VP of Membership as time allows

# Memberships

- We have 600+ paid members
- Under Encompass, we had reminders set to go out multiple times before and after renewal date
- Under Hivebrite, we are limited to one automated reminder before, and one automated reminder after, renewal date
- So, we're working on ways to keep members as engaged as before
- Also, we remind members that their auto-renewals didn't carry over, so ONE TIME, they need to set auto renewal up again

# Brian Hughes '71

MIT Club of Cape Cod

# My Presentation Roadmap

Brian Hughes, VP of Events, MIT Club of Cape Cod

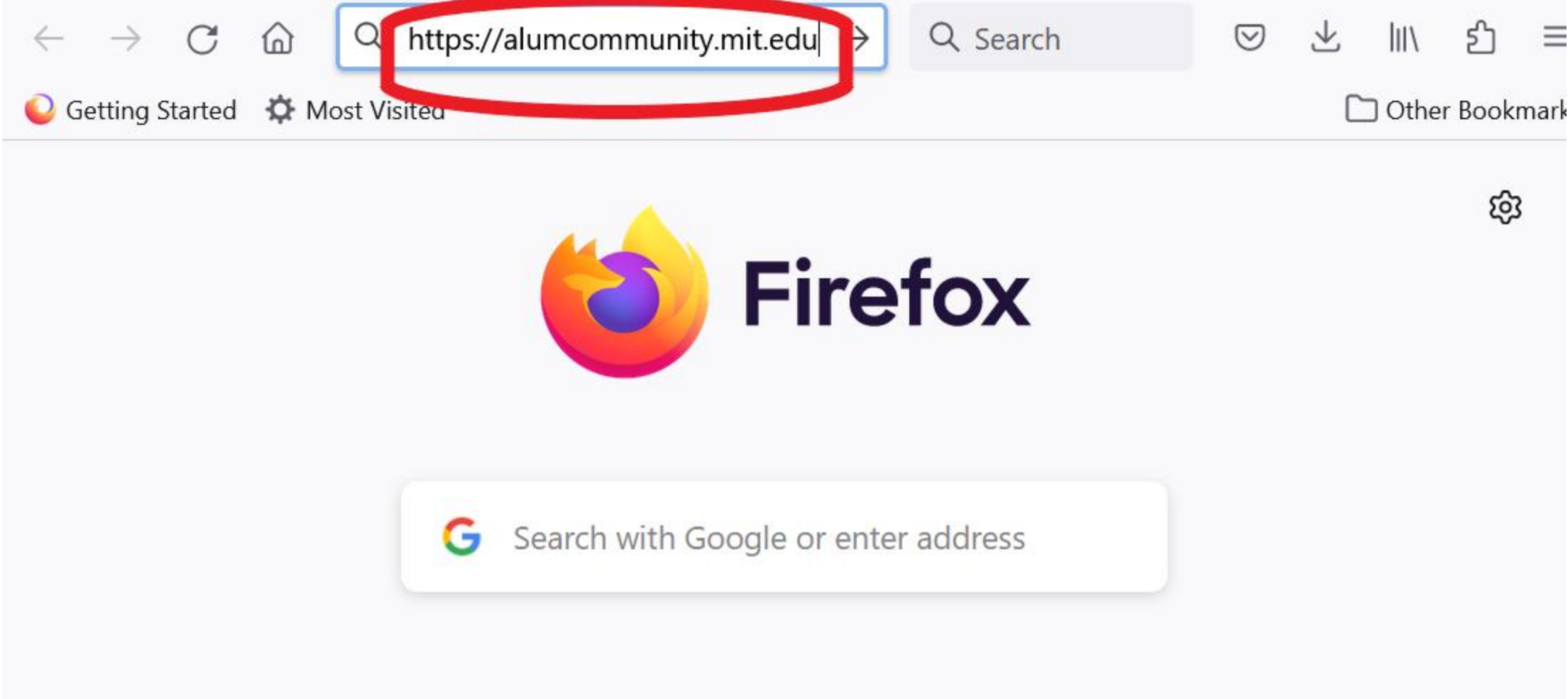
- Become an Admin – the Back Office
- Introduction to web page navigation
  - Top level home page
  - Select your club from your groups
  - Your club's home page
- Help
  - Self help
  - Community help
  - AA help
- Tips & open questions
  - How to add/manage meals
  - Zoom setup
  - ...



# Become an Administrator

- **Watch the Short Training Videos**
  - **Events**
  - **Email**
  - **More to come ?**
- **Let your AA contact know you've watched the video**
- **Play in the Sandbox**  
**(see later slide)**
- **Go for it**
  - **Proofread carefully**

# Start your Journey



MITALUMNI



Home Alumni Groups All Events About Alumni Directory Give Admin Panel



Welcome back 🤝

**My groups**

My events

My account

Update my alumni record

Events (12)

See all



28 Alumni Leadership Conference 2023



28 Fall Tech Social



28 STEAM Family Night



# Your Club Home

MITALUMNI



[Home](#)

[Alumni Groups](#)

[All Events](#)

[About](#)

[Alumni Directory](#)

[Give](#)

**Admin Panel**



[Manage group](#)

## MIT Club of Cape Cod



**+69**



**Joined** ▼

[Home](#)

[Lobby](#)

[About Us](#)

[Events](#)

[Members](#)

[Memberships](#)





# Groups you can administer

Groups (2) Export

Keywords  Categories

[All](#) [Pinned in suggestions](#) [Not in category](#)

Cover picture	Group ID	Title	Categories	Features activated	Members	Publication
	21812	MIT Club of Cape Cod	<a href="#">US Clubs</a>	<input type="checkbox"/> Home <input checked="" type="checkbox"/> Events <input checked="" type="checkbox"/> Members <input checked="" type="checkbox"/> Memberships <input checked="" type="checkbox"/> News <input checked="" type="checkbox"/> Media center <input type="checkbox"/> Forums	77	<input type="checkbox"/> Pin to suggestions <input checked="" type="checkbox"/> Public ⓘ <span>Edit</span> <input checked="" type="checkbox"/> Published <span>Support</span>
	21820	Hivebrite Volunteer Sandbox		<input type="checkbox"/> Home <input checked="" type="checkbox"/> Events <input checked="" type="checkbox"/> Members <input checked="" type="checkbox"/> Memberships <input checked="" type="checkbox"/> News <input checked="" type="checkbox"/> Media center <input checked="" type="checkbox"/> Forums <input type="checkbox"/> Projects <input type="checkbox"/> Mentoring	90	<input type="checkbox"/> Pin to suggestions <input type="checkbox"/> Public ⓘ <span>Edit</span> <input checked="" type="checkbox"/> Published <span>Support</span>

# Club Events

[Groups](#) >

Create a new event

## MIT Club of Cape Cod

Members & Prospects

Engagement scoring

Events

News

Campaigns

Media center

Forum


Group tabs

Settings

### Events (142)

Keywords

Locations

 Type & select a loc.

Category

Select an option ▼

All

Upcoming

Past

Draft

Published

Public

Private

Created from network




Created by user

Related groups

Pinned on feed(s)

Online events

« ‹ 1 2 3 4 5 ... 8 › »

Event name	Creator	Category	Start date ▼	Location	Registrations	Public	
 Barnstable County Sherrif Donna Buckley	MIT Club of Cape Cod	In-Person	10/12/2023	287 Iyannough Rd, Hyannis, MA 02601, USA	9	<input checked="" type="checkbox"/>	  Support

# Club email

[Groups](#) >

Create campaign ▼

## MIT Club of Cape Cod

Members & Prospects Engagement scoring Events News **Campaigns** Media center Forum Group tabs

Settings

Campaigns Reports

Type of campaigns

Email campaigns ▼

### Email Campaigns (2)

Search for a campaign

Please enter 1 or more characters

Categories

All Categories ▼

All statuses

Drafts

Published

Scheduled

Support

# Help

## Self Help - the Sandbox

MITALUMNI



[Home](#) [Alumni Groups](#) [All Events](#) [About](#) [Alumni Directory](#) [Give](#) [Admin Panel](#)



### Hivebrite Volunteer Sandbox



[Live feed](#) [Connect](#) [Memberships](#) [Events](#) [News](#) [Media center](#) [KBB Test](#) [Forums](#) [Training & Resources](#)  
[Shovels & Buckets](#) [Newsletter Archive](#) [New Tab](#)



# Help

## Community Help - the Forum

**MITALUMNI**



[Home](#)

[Alumni Groups](#)

[All Events](#)

[About](#)

[Alumni Directory](#)

[Give](#)

[Admin Panel](#)



**MITALUMNI**

[Manage group](#)

### Hivebrite Volunteer Sandbox



+85



[Joined](#)

[Live feed](#)

[Connect](#)

[Memberships](#)

[Events](#)

[News](#)

[Media center](#)

[KBB Test](#)

[Forums](#)

[Training & Resources](#)

[Shovels & Buckets](#)

[Newsletter Archive](#)

[New Tab](#)

# Help

## Community Help – Peer Mentors

- Bob Schaffel - Class of 1971, Club of Montreal
- Coleen Smith - AMITA

# Help

## AA Email Help

- Hivebrite Support <[MITHivebriteSupport@mit.edu](mailto:MITHivebriteSupport@mit.edu)>
- Support from the dedicated Alumni Association staff. If they can't fix/answer your problem they can reach out to Hivebrite corporate support.

# An Example – Help in Action

- Our events almost always include meals
- Attendees choose the entree they want – same price for each choice

So I tried the “Additional Items” in the Registration section

### Additional Items

*Create additional items for your event. You can associate these with tickets or leave them alone as stand-alone items. If they are stand-alone items, they will be shown at the bottom of the registration form.*

ID	Name	Price	Activation date	Expiration date	Available units	For tickets
----	------	-------	-----------------	-----------------	-----------------	-------------

[New additional item](#)

- These are set up to sell individual things ballet tickets
- ???
- I'll ask mentor Bob Schaffel







## An Example – Help in Action 2

- Bob got right back to me. Told me to click on Add a Field in the Registration Form section of the Registration page. This appears below the Add an Item I had tried and rejected

The screenshot shows a configuration interface for a registration form. At the top, the title "Registration form" is displayed. Below it, a subtitle reads "Collect the below information for the pa...". A blue button labeled "Add a field" is positioned above a list of fields. The first field is "Std Mobile phone", which has a "Require" checkbox to its right. Below the field list, there is a checkbox labeled "Enable help text during registration" and a note stating "Standard fields are associated with all tickets". A second "Add a field" button is shown below the first one, along with another "Enable help text during registration" checkbox.

## An Example – Help in Action 3

Add a new field

		
<b>Text</b> Titles, names, paragraphs	<b>Boolean</b> Yes or no, true or false...	<b>Number</b> ID, order, integer number, rating, quantity
		
<b>Date</b> Event date, opening hours	<b>Select</b> List of options	<b>Double select</b> Two levels options list

## An Example – Help in Action 4

- Success! A menu selection added to the event registration
- Members have signed up for the event and selected their entree

Entree

Display name \*

Placeholder

Tooltip

Options (should never be empty) - [Order options by alphabetical order](#)

x

x

x

[Add](#)

Multiple options allowed

## An Example – Help in Action 4

- OK. Let's see how many orders we've gotten so far for Fish, Meat, or Veggie
- Umm – I can't find any way to actually see these entree orders.
- Time to call [MITHivebriteSupport@mit.edu](mailto:MITHivebriteSupport@mit.edu)
- Quick response - "you will need to go to Participants then click on 'Export Attendee Data to Excel'. However, I exported this data and the entree data is not downloading in the report. I'm contacting Hivebrite about this"
- The next day "[Hivebrite says] When you go to Participants then click on "Export Attendee Data to Excel", you will get a pop-up window with data fields to select. Under "Complementary Information" select Entree. The entree selections will appear in the report."



## An Example – Help in Action Success!

	A	B	C
1	<b>Attendee</b>	<b>First name</b>	<b>Entree</b>
2	386871	Brian	Fish - Baked Salmon file
3	386872	Karen	Meat - Chicken <u>picsata</u>
4	394792	Scott	Fish - Baked Salmon file
5	398851	George	Fish - Baked Salmon file
6	398950	Steven	Fish - Baked Salmon file
7	399192	Michael	Fish - Baked Salmon file
8	399462	Lillian	Fish - Baked Salmon file
9	399563	Jon	Meat - Chicken <u>picsata</u>
10	400647	Nancy	Fish - Baked Salmon file

- ♡ With a salute to Kim, Kimberley, Nora, and the rest of the staff at the AA office

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Questions?

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Thank you!