

*ALUMNI CLUB
LEADERS HANDBOOK*

VERSION 2.0

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Alumni Club Leaders Handbook

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Support for the Business School Alumni Club Network

At a time when direct funding for all Business School initiatives is at a premium, we are very pleased to be able to continue a high level of support for our alumni clubs. This support, though resource intensive, only occasionally takes the form of direct financial contribution to individual clubs. Instead, Alumni Relations provides a variety of support staff, services and programs designed to simplify management of the clubs and improve communication of club events and activities.

Professional Staff

Alumni Relations has a full-time **Assistant Director** position who manages the Alumni Club Network. This position's primary responsibility is Alumni Clubs and club-related support. This position is currently open, but will be filled soon after Reunion Weekend 2003. Until this position is filled, Ann LaCivita (adl@umich.edu) and Melanie McIntyre (melrm@umich.edu) will be managing club-related activities.

Another member of our team, our full-time **Assistant Director** for Online Services, is available to provide support for all club-related online initiatives, including the club management module, club websites and limited email events promotion.

Online Services

During the last several years, Alumni Relations has worked closely with the Business School's IT staff to develop a series of electronic tools and services designed to streamline management of alumni club membership and communication. These tools and services are available free of charge to all our alumni club leaders.

Our innovative **Club Management Module** enables clubs to manage their memberships online while linked directly to the Business School's alumni directory. Via the Module, club administrators can add and delete members, update contact information, track dues payment, send global emails to their membership and download their membership list into a text file.

Each of our alumni clubs has access to an interactive **Club Website** template, which can be tailored to reflect the individuality of each club. Club webmasters are given direct access to the template for self-customization, or they can work with the Assistant Director of Online Services. Each Club Website features message boards, both professional and personal, that are directly accessible to all club members. Each Website also includes a **Club WebBoard** that supports threaded discussion on a variety of topics. Access to club WebBoards is available to all iMPact (formerly M-Track) subscribers.

Alumni Relations also provides online promotion of alumni club events and activities. All events are listed on the **Events Calendar** on our website. Club events

and activities are also featured in each issue of **MichiganMail**, our bi-monthly e-newsletter for all alumni. In addition, Alumni Relations sends limited individual **Global Email Announcements** for important upcoming club events to all alumni in the club's geographic area.

Alumni Relations is currently working with the Business School's IT department to modify the Online Alumni Directory to allow club leaders the opportunity to **download and email all alumni in a certain geographical area**. For example, the club leader in Chicago will be able to log into the Online Alumni Directory and, being recognized as the Chicago club leader, will be permitted to download a list of all alumni in the Chicago metro region for the purpose of club communications.

In addition, Alumni Relations and IT are working together to further modify the Online Alumni Directory to allow Business School community members to **search for alumni by club membership**. For example, any community member with iMPact access will be able to log into the Online Alumni Directory, and pull a list of all alumni who belong to the Atlanta Alumni Club. This functionality will also apply to other kinds of alumni relationships, such as the Willing to Counsel alumni list.

Printed Communications

Alumni Relations will fund one **Annual Membership Mailing** to all alumni in a club's geographic area pending available budget resources. This mailing should introduce the Club to alumni who are new to the area or who have not been involved in previous club activities. A clear statement of the Club's mission and purpose and a calendar of upcoming activities make a good impression and inspire people to join. Some clubs include a survey both to elicit new volunteers and to determine the kinds of programming of greatest interest to area alumni. For those clubs who charge dues, articulation of the benefits of membership is important.

A key purpose of the membership mailing is to elicit email addresses from alumni. Most club communication – and Alumni Relations communication – is electronic, and we need to convey that an up-to-date email address is necessary for alumni to stay connected with both the Club and the Business School.

Alumni Relations will also fund at least one annual **Event Invitation** per club pending available budget resources. This includes both design and postage. Depending on the event, this invitation may be an informal flyer, a notice on our pre-designed Alumni Events postcards or a specially designed invitation. We will consider other requests for club mailings on an ad hoc basis, as funds permit.

Club Promotions

Alumni Relations works with administrative colleagues and students to promote club activities both within the Business School and to alumni around the world. In addition to MichiganMail, listed above, the Club Network and its activities are

promoted in a number of media, including the Alumni Relations website, *Dividend* alumni magazine and *The Monroe Street Journal* (student newspaper). We rely on club leaders to provide us with timely communications about upcoming events, as well as high-quality photos and detailed reports of events that already have taken place.

Annual Leadership Workshop

Each year, Alumni Relations sponsors a Workshop for alumni club leaders and regional contacts on the Thursday before Reunion Weekend. This event provides a much-needed opportunity for club leaders from all over the world to meet face-to-face to get to know each other, share best practices and brainstorm solutions to common challenges. The format of the Workshop has evolved each year: in 2002, it became an all-day event with a professional mediator.

Participating club leaders are provided with valet parking, breakfast and lunch, and they are invited to attend the annual Dinner with the Dean and the Alumni Board of Governors on Thursday night. They also are given free admission to the Annual Business Conference on Friday

In 2003, Alumni Relations recruited a committee of club leaders to help plan the Leadership Workshop. We will continue this practice in future years. We encourage all interested club leaders to join the planning committee, provide input about Workshop content and – above all – to plan well in advance to send at least one club representative to the meeting.

Club Responsibilities

The Michigan Business School Alumni Club Network is relatively young. Without an established tradition of club formation and management, our clubs have developed organically and spontaneously over the last 5 to 10 years. On the plus side, this absence of precedent has enabled especially energetic club leadership teams to take the ball and run with it. A number of our larger clubs have, on their own, devised very successful and active organizations with a minimum of oversight from Alumni Relations.

On the negative side, many of our smaller clubs have had a more difficult time putting together a sturdy club structure and ensuring continuity over time. In addition, alumni interested in forming new clubs are turning increasingly to Alumni Relations for more formal guidance about putting together a new organization. After much consideration and input from leaders of clubs both large and small, Alumni Relations has instituted some guidelines for forming new clubs [see page 6].

In addition, we have become aware of the need for basic practices that ensure annual accountability from all our alumni clubs, new and established. We therefore propose the following annual responsibilities for all Michigan Business School Alumni Clubs. Your comments and feedback are welcome.

Strategic Plans & Timelines

Each club should determine when its official administrative year begins and ends, and notify Alumni Relations of that date. Prior to or concurrent with that date, each club should compile and submit a Strategic Plan and Timeline to Alumni Relations. This plan should contain goals for the coming year, as well as a proposed list of events and activities and suggested dates. If compilation of the annual plan coincides with the election of new club officers, that information should be included, as well.

BEST PRACTICE: Michigan Business School Club of New York

Events & Activities

At the beginning of a Club's administrative year, the leadership should commit to a minimum of 4 events or activities for large clubs and 2 events or activities for smaller clubs, spread out over the upcoming year. These events need not be large or expensive, but they should be planned with certain goals in mind. [See page 26.] Alumni Relations will provide support for these activities, as outlined above.

BEST PRACTICE: Michigan Business School Club of Chicago

Annual Report

Near the end of a Club's administrative year, the Club should compile and submit an Annual Report to Alumni Relations and, if desired, to its membership. This report should review the previous year, highlighting best practices and successful events and activities. Challenges and lessons learned should also be included.

BEST PRACTICE: Michigan Business School Society of Washington, DC

Example can be found at the end of this section.

Regular Communication with Alumni Relations

One Club Leader, usually the President, should be the primary contact between Alumni Relations and the Club. This contact or his/her delegates should keep Alumni Relations apprised of all upcoming activities and all changes in leadership or club structure. In addition, all requests for Alumni Relations' assistance should be communicated as early as possible, especially in relation to online services and events development, coordination and promotion.

BEST PRACTICE: Michigan Business School Club of New York

Adoption of Club Management Tools

Alumni Relations and the Business School IT Department have dedicated a great deal of time and effort to developing a sophisticated set of electronic tools to help Alumni Club Leaders manage their club memberships. [See page 15 for details.] Alumni Relations is committed to integrating all club databases into the Club Management Module by early 2004. To that end, all established and forming clubs that have not done so should identify a volunteer to discuss and schedule database integration and club website customization.

BEST PRACTICE: Michigan Business School Club of Detroit

Establishing a New Club

A few times a year, Alumni Relations gets inquiries from interested alums about starting a new Michigan Business School alumni club. Often, the alum is a recent graduate who has just started a job in a new city and wants to tap into the Business School social network in his or her new hometown. Sometimes, the alum is newly retired, and is looking for a way to get involved with the Business School now that he or she [finally!] has some free time. More frequently of late, we are hearing from alumni affected by the economic downturn who want to create access to the Business School professional network in their city or region.

These are all excellent and valuable reasons for creating a Michigan Business School alumni club. However, we have found from experience that even the most enthusiastic individual cannot establish and sustain a viable organization on his or her own. In addition, no single motivation or activity, however compelling, can provide enough content to attract significant alumni participation in club activities over time. Finally, the relationship between the alumni club network and the Business School is a reciprocal one. In return for providing club support, Alumni Relations expects the clubs to be aware of and to support important Business School programs and initiatives.

To help alumni determine the viability of an alumni club in their city or region, Alumni Relations has prepared some written guidelines, below. We hope these guidelines will be useful not only to new and forming clubs, but also to our established clubs, many of which have provided ideas and inspiration through their own independent efforts.

We are always happy to discuss formation of new alumni clubs! For more information about organizing alumni in your city or country, contact Alumni Relations at alumni@umich.edu or 734.763.5775.

Business School Database Query

When contemplating formation of a new alumni club, the first step is to determine the number of Business School alumni in your city or region. At your request, Alumni Relations will run a database query based on pertinent geographic parameters [e.g., area codes, zip codes or states]. The query can tell us not only how many alumni are in your area, but how many of them have up-to-date mailing and email addresses.

If the query results show a very small alumni population, we may suggest that you focus your initial efforts on arranging an informal gathering at your home or a local restaurant. If enough people express interest in an ongoing organization, we will work with you to define expectations for a very small club. If response to your

invitation is poor, a formal club may not be a viable prospect. One solution might be to tap into the larger UM alumni network in the area. You could also explore whether joint Business School organization exists in your area that caters to alumni from several business schools. An Internet search might help you find such an organization, if one exists.

Survey of Regional Alumni

If our database query shows that a significant number of Business School alumni live or work in your area, the next step is to put together an introductory letter and optional survey. In the cover letter, introduce yourself and explain what you want to accomplish by establishing a formal Business School alumni club in the area. Emphasize that efforts are in the early planning stages, and that you are looking for other alumni who would like to become part of the leadership team. If you choose, a survey can accompany your letter that elicits input on programming and other issues.

BEST PRACTICE: Michigan Business School Club of London

Alumni Relations will help you produce and mail this communication. Please allow at least three weeks for production and mailing. Alumni Relations will also send an email version to all alumni in your region for whom we have up-to-date email addresses. Alumni Relations will collect and tabulate survey responses, update contact information in our database and forward volunteer offers and survey responses to you. Responses to this initial survey will become the basis for creation of your club's initial membership list in the Club Management Module.

Building a Leadership Team

Once you've received some favorable responses to your introductory letter, it's time to call a mandatory meeting of interested volunteers. Choose a date, time and location amenable to all. The location should have tables for writing and be conducive to conversation. Come prepared to take careful notes, or ask for a volunteer note taker.

BEST PRACTICE: Michigan Business School Club of Los Angeles

Defining Mission & Goals

Why form an alumni club? Brainstorm ideas for a mission statement, and then list several goals for the new organization. Consider both regional alumni activity and support for University of Michigan Business School programs and initiatives.

Creating a Club Structure

Because of the informal way in which the Michigan Business School Club Network has evolved, Alumni Relations has not specified any particular administrative structure for our alumni clubs. However, we have received a number of requests for

a more formal process that new clubs can follow when getting started. At the club's first leadership meeting, Alumni Relations suggests starting with the following club structure, which can be adapted to meet the particular needs of smaller and larger clubs.

Constitution & Bylaws

A club's constitution is, in essence, its formal statement of purpose. It specifies the club's name, defines membership eligibility, identifies officer positions and tenure, outlines the committee structure, specifies when and how elections will be held and determines how frequently the club leadership will meet.

A club's bylaws provide details of the club's operating procedures, including job descriptions for each officer, meeting schedules, term limits and election procedures.

BEST PRACTICE: Michigan Business School Black Alumni Association

Officers' Roles & Responsibilities

The slate of officers varies from club to club, depending on the size of the leadership team and the interests of alumni volunteers. However, almost all clubs have a basic officers group consisting of a President, Vice President, Secretary and Treasurer. In smaller clubs, each officer may be responsible for a range of duties. In larger clubs, additional Vice Presidents may be elected or Committees formed to head up special projects or initiatives.

President: The club president is the primary contact with Alumni Relations. He or she is responsible for leading the club's strategic planning and works with the other officers to put together annual plans and timelines. The president calls and runs regular officers meetings and represents the club locally and within the Business School community. Most important, the president is responsible for assuring the continuity of the club by managing the process of officer succession and transition.

Vice President: The vice president has primary responsibility for program planning and management. The vice president recruits alumni volunteers to help with club events and activities. In smaller clubs, the vice president often manages the Club's website.

Secretary: The club secretary manages the club's membership database via the Club Management Module. He or she is responsible for managing internal club communications and works closely with Alumni Relations on all mailings and e-mailings to the larger alumni community. The secretary takes minutes of meetings and works with the president and other officers to compile the club's annual report. The secretary manages the club's annual membership drive.

Treasurer: The club treasurer maintains the club's bank account and tracks its finances. The treasurer collects and records annual dues, if applicable. The treasurer pays all club bills and records sources of income. The treasurer works with the president and other officers to put together an annual budget. The treasurer also explores potential sources of funding.

Establishing Committees

In addition to the traditional leadership roles, a number of other leadership positions have been found useful by many of our alumni clubs. These positions help support important Business School initiatives and projects of special importance to regional alumni.

Admissions Committee: Works with the Business School Admissions Office to support recruiting activities for prospective and admitted students.

Student Support Committee: Works with Alumni Relations, OCD, Global Blue Student Association and other student clubs to support mentoring, networking, career development and job placement efforts for current students.

Alumnae Committee: Works with the Business School Women in Business Initiative to develop and support networking efforts for women students and alumnae.

Annual Giving Committee: Works with the Director of Annual Giving at the Business School to develop an understanding of development efforts and participation in the Michigan giving tradition.

Publicity Committee: Promotes the club and its activities to local alumni and the regional business community; explores local media resources; publicizes the club to current Business School students and new grads, as well as other members of the Business School community.

Community Service Committee: Explores and promotes opportunities to involve the club in local public service efforts.

Other committees can be formed as club interests evolve and membership increases.

BEST PRACTICE: Michigan Business School San Francisco Bay Area Club

Defining Club Membership

An important step for all of our clubs, both new and established, is to determine what is meant by the term “membership.” For some clubs, membership pertains only to those alumni who have paid dues to the organization. In addition to this core membership, these clubs may also have a second tier of club affiliates: local alumni who attend club events and are included on the club’s email list, but have chosen not to pay dues. ***If a club has a dues structure, all officers must be official dues-paying members in order to hold office.***

For other clubs, especially those that do not collect annual dues, membership is more loosely defined. All alumni in a particular region are de facto members of the club, or all alumni on a club’s email list, managed via the Club Management Module, are counted as members. Early in a club’s formation, the leadership team should think about which membership model is best suited to their organization, and include that information in the club’s Constitution or statement of purpose.

Charging Dues

Unlike the UM Alumni Association, Business School Alumni Relations does not require alumni to pay annual dues to our office to belong to regional alumni clubs. However, some of our individual Business School clubs have elected to charge dues to help raise money for operating expenses. While Alumni Relations will provide limited financial assistance to new clubs as they get off the ground, having additional revenue generated through dues can be very useful. Some clubs choose not to charge dues during the first year while they establish their programs and get a solid leadership team in place. Other clubs charge dues from the start. The most important requirement, if you choose to charge dues, is to articulate exactly what the dues revenue will be used for and why alumni should pay them. In short, what are the benefits of membership in your club?

Different clubs charge different amounts for dues, depending on what the local market will bear. Some clubs have special rates for students and new grads, discounts for signing on for more than one year, family discounts and other incentives.

BEST PRACTICE: Michigan Business School San Francisco Bay Area Club

Benefits of Membership

Most clubs provide specific benefits to dues-paying members. Benefits can include receipt of a monthly club e-newsletter, discounted attendance at club events, discounts to other Michigan Business School programs (e.g., Reunion or Executive Education seminars), members’ only events, reciprocal discounts to alumni events in

other cities and countries, etc. Some clubs reduce annual dues for new graduates, or waive the first year fee altogether.

Providing a rationale for dues may be as simple as explaining the benefits of a Michigan Business School alumni club in your area. Income from dues helps the club plan bigger and better events, which attract more alumni and area business leaders and increase opportunities for professional and social networking. Once alumni realize value from a well-executed club event or activity, they will be much more likely to sign on as dues paying members in the future.

Reviewing Business & Legal Issues

All clubs should consider the following issues at an early stage in their formation. *For more complete information, we recommend consultation with local accounting, insurance and legal professionals.*

Starting Scholarship Funds

For clubs who are thinking of starting a scholarship fund, all scholarship contributions must be in the form of checks made out to the University of Michigan (rather than to the Club) and sent directly to the Business School Development & Alumni Relations Office for processing, to ensure that donors are granted tax exemption through the University. If you are interested in starting a scholarship fund, please contact Development and Alumni Relations at 734.763.5775 or alumni@umich.edu for information and advice

Managing Club Funds

Some Business School alumni clubs choose to open a separate bank account. This makes sense especially for clubs that charge or plan to charge membership dues. To open an account as an organization rather than an individual, banks may require a taxpayer identification number (use federal tax form SS-4 to apply for one). *This ID number has no effect on the club's tax status.* Whether the club opens an account as an organization or not, club funds and individual officer funds should never be co-mingled. According to the UM Alumni Association, keeping them separate reduces the liability for individual members and provides a mechanism for clearly tracking club income and expenses.

Insurance / Liability Coverage

In September 2003, Alumni Relations met with members of the UM General Counsel Office, Risk Management Office and the Alumni Association to map out some guidelines for liability coverage for Business School alumni clubs.

To ensure liability coverage by the University of Michigan:

- Alumni Relations should sign all contracts with 3rd party vendors. This places liability on the University rather than the club or the individual club officer. You can fax contracts to Alumni Relations at 734.615.6103.
- Whenever possible, host events with liquor in a hall or restaurant with a liquor license. If an event is held at a private residence, there is a greater likelihood that the host will be held liable for personal or property losses that result from serving liquor. If an event is held in a residence, under no circumstances should a fee be charged for drinks. A liquor license is required to sell alcohol, and violation of this law would invalidate any liability coverage you might have.

Currently, the University can not provide insurance coverage for international clubs due to the different insurance laws in each country. Alumni Relations will continue to have conversations with the General Counsel and Risk Management Offices to determine if there is possible solution for insurance coverage for international clubs.

Confidentiality Agreements for Use of Alumni Data

When we receive an inquiry from an alum about starting a new alumni club, Alumni Relations will run a database query and forward the contact information of area alumni to that individual. This is highly confidential information and is to be used for club-planning purposes only. All alumni who receive confidential information from the Business School Database will be asked to sign the following statement:

Before we can share our alumni contact information with you, we are required by University policy to ask that you agree to protect the privacy of our alumni by observing the conditions listed below.

- I agree to limit my use of the alumni contact information for the stated University purpose.
- I will not release or disclose the alumni information to a third party.
- I will destroy or return all copies of the alumni information once my project is completed.

A copy of the actual confidentiality agreement can be obtained from Alumni Relations.

Privacy Guidelines for Using Alumni Photos

To protect the privacy of our alumni, we are now required by the UM General Counsel's Office to clearly inform attendees at alumni events, including club events, that we may publish their photos or video images on our website or in Dividend alumni magazine. To be sure that Alumni Relations can publish your photos without delay, please follow these guidelines:

- The following opt-out disclaimer should be printed on invitations to events where photos may be taken: "This Michigan Business School Alumni event may be photographed and/or videotaped. Photographs or video images from this event may appear on the Business School website, in Dividend magazine, or in Business School or club promotional materials. If you do not want your image used for these purposes, please contact [*club leader's name*] or Business School Alumni Relations at alumni@umich.edu or 734.763.5775."
- Club leaders may also make a verbal announcement of the opt-out disclaimer at alumni club events.

If photos are taken at an alumni event that is not covered by the opt-out disclaimer, each pictured individual must be contacted for permission to publish their photo. This is a very slow and often frustrating process for club leaders and Alumni Relations, especially when the pictured individuals are not clearly identified. Any time photos are taken at a club event, please identify each pictured individual before submitting the photo to Alumni Relations. Including email addresses is also very helpful.

Managing & Growing Club Membership

Club Management Module

Alumni Relations and IT have developed an excellent set of electronic tools for managing alumni club membership. The Club Management Module is linked directly to the Business School Alumni Database. Trusted Club Contacts within each club (usually the president and treasurer) have access to an administrative application that enables them to add and delete members, update contact information, record dues payments and send global email to the group via iMPact (formerly M-Track), the Business School's Intranet.

In addition, the Club Management Module has a function that enables clubs to download information in the administrative application into Excel spreadsheets for multiple uses including guest lists, nametags and email that requires an HTML format or attachments. (Currently, the iMPact email system is plain text only and cannot accommodate attachments.)

See Tab 8 for additional information about the Club Management Module.

Club Website Template

Complementing the Club Management Module is an interactive Club Website Template that is available to each of our alumni clubs. Each club can tailor the template to fit its own organization. Alumni Relations strongly encourages each club to appoint a Webmaster who will oversee the site's customization and be responsible for keeping it up-to-date. Advanced programming skills are not required. Club leaders can post important announcements, construct a schedule of upcoming events and help direct dialogue on the club's WebBoard, which permits threaded discussion on a number of topics.

In addition to those parts of the website accessible to club leaders only, all club members will have the ability to post messages to the website, upload photos, etc. And all alumni who have access to iMPact will be able to participate in the threaded discussion on the club's WebBoard.

See Tab 8 for additional information about the Club Website Template.

Melanie McIntyre, Assistant Director of Alumni Relations & Manager of Online Services, is your primary contact for questions about converting your club's database or email group to the Club Management Module and for development of your club's website. We recommend that new clubs contact Melanie as soon as possible to get the online services portion of your organization underway. Melanie's email address is melrm@umich.edu.

Annual Membership Mailing

In addition to the initial membership survey sent out by new clubs, Alumni Relations will produce and fund one follow-up membership mailing for all clubs each year. The mailing will introduce the club and its activities to area alumni (especially those new to the community), provide a calendar of upcoming events, ask for leadership volunteers, explain the dues structure (if there is one), etc. All responses will be sent to Alumni Relations for processing; any dues collected will be forwarded to the clubs.

Most important, the membership mailing will elicit updated contact information from alumni, especially updated email addresses. Most club and Business School communications to alumni are electronic, and expanding our email database is of primary importance for building the Business School alumni network.

Club Management Documentation

Club Management Module Description and Instructions for Launch

Description and Benefits

An online application to manage club membership, post events, send emails to club members and download member information to create reports and labels. This module integrates your club directory with the Business School Alumni Directory in iMpack. Thus, when the alum, the club or Alumni Relations updates an alumni record, the change will appear in both the club database and the Alumni Directory in iMpack.

Launching the Module for Your Club

The club needs to provide Alumni Relations with the names of the members of the club. In order to do this, the club needs to decide what constitutes membership for the club (dues or no dues). If a membership drive is desired, Alumni Relations will assist the club in conducting a direct mail or email membership solicitation of Business School alumni in the club's city or region.

Please note that you must have permission (via dues, email, etc.) from each club member to have their name included in the directory.

Alumni Relations will assist in creating pertinent communications for the membership solicitation and launch of this module.

For more information about launching the club management module for your club, contact Melanie McIntyre at melrm@umich.edu.

Club Management Module Features

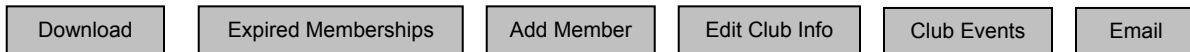
Page Header

The page header lists the club name (which appears as a drop-down box because alumni can be Trusted Club Contacts for more than one club), email address if they have one, web address if they have one and a place for a description of the club:



Club Name: Zell Lurie Institute Alumni
Email: zlicontact@umich.edu **Web:** <http://www.zli.bus.umich.edu/>
Club Info: List of alumni interested in the Zell Lurie Institute.

Buttons Overview



Download: Allows Trusted Club Contacts (TCCs) to download selected items from iImpact into a text file, which can be saved on disk or hard drive and used for mailing labels, etc.

Expired Members: Lists club members that have not paid a membership fee to remain active (not applicable to all clubs).

Add Member: Contains a search mechanism that allows the Trusted Club Contacts to add alumni to the club.

Edit Club Info: Allows Trusted Club Contacts to edit club information found at the page header (see **Page Header** above).

Club Events: Trusted Club Contacts can use the provided form to post a club event to the Alumni Events Calendar on the Alumni Relations website – <http://www.bus.umich.edu/AlumniCommunity>. If a club is using the new club template, the event will also post on their website.

Email: Trusted Club Contacts can use this to email specific groups within the club, or the entire club constituency, through iImpact. Club members email addresses are listed “Bcc” and will not be visible to other club members, and the return address will be the Trusted Club Contact’s email address specified in iImpact. Message sent via the module will be in plain text and cannot include attachments.

Trusted Club Contacts can also use this button to download club member email lists into a text file for import into another email application, i.e. Outlook.

Member Information Table

The information contained on the table is only a small selection of that to which Trusted Club Contacts have access. Keep the following in mind when using the table.

Member's Information

Click on a member's name to edit individual member.

Name	Club Office	Title/ Company	Email	Degree	Membership Type	Member Since	Membership Expire Date	Action
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Name: By clicking on the name, TCCs are able to edit an alum's personal and professional contact information, club status and email. Any other changes to an alum's record (i.e. degree information) are handled through AEIS, the Alumni Relations internal database. Changes saved to the Club Management Module are immediately saved to both iImpact and to AEIS.

Club Office: This field was originally intended to list club officers. However, it can be used as an open text box to note various things, i.e. amount of dues payment, length of membership, etc.

Title/Company, Email and Degree: Currently, only this information can be viewed from the initial table. One must click on an individual name to pull up other personal and professional information (see **Member Information Page** below).

Email: TCCs can email individual members by clicking onto the given email address. You will be transferred to the email screen on the iImpact system, which sends text in plain format. Attachments cannot be sent via this system.

Membership Type: Allows TCCs to differentiate between dues paying members, non-dues paying members and officers.

Member Since: Allows TCCs to indicate date member joined.

Membership Expire Date: Allows TCCs to set a date when a person's membership expires.

Action: Provides a quick way to delete a record from the club list.

Note: *Currently non-alumni cannot be added to the Club Management Module. If you have non-alumni members in your club, please contact Melanie McIntyre at melrm@umich.edu or 734.763.5775 to determine next steps.*

Member Information Page

This is the information available to TCCs for each member.

Member's Name:	McIntyre Melanie Last Updated: 10/21/2002
E-mail Address:	<input type="text" value="melrm@umich.edu"/>
Member Type:	<input checked="" type="checkbox"/> Officer <input checked="" type="checkbox"/> Dues-Paying Member <input type="checkbox"/> Non Dues Paying Member
Member Since:	<input type="text"/> (mm/dd/yyyy)
Membership Expire Date:	<input type="text"/> (mm/dd/yyyy)
Club Office:	<input type="text"/>

Work Address	Last Updated: 06/19/2002 Publish:												
Title:	<input type="text" value="Assistant Director of Online Services,"/>												
Company:	<input type="text" value="University of Michigan Business School"/>												
Street 1:	<input type="text"/>												
Street 2:	<input type="text"/>												
Street 3:	<input type="text"/>												
City	<input type="text"/>												
State/Zip	<input type="text"/> <input type="text"/> Zip: <input type="text"/> - <input type="text"/>												
Country:	<input type="text"/>												
	<table border="1"> <thead> <tr> <th>Country Code</th> <th>Area Code</th> <th>Number</th> <th>Ext.</th> </tr> </thead> <tbody> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </tbody> </table>	Country Code	Area Code	Number	Ext.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Phone:													
Fax:													

Industrycode:	<input type="text" value="Education"/>
Functioncode:	<input type="text" value="Other"/>

Home Address	Last Updated: 08/19/2002		Publish:	
Street 1:	<input type="text" value="4419 Dexter-Pinckney Rd"/>			
Street 2:	<input type="text"/>			
Street 3:	<input type="text"/>			
City	<input type="text" value="Dexter"/>			
State/Zip:	<input type="text" value="Michigan"/>	Zip:	<input type="text" value="48130"/>	<input type="text"/>
Country:	<input type="text" value="USA"/>			
	Country Code	Area Code	Number	Ext.
Phone:	<input type="text"/>	<input type="text" value="734"/>	<input type="text" value="834518"/>	<input type="text"/>
Fax:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Protocol

Confidentiality

Alumni give or refuse permission to have their personal and professional contact information made available on iImpact. Thus it is necessary, as Trusted Club Contacts, to maintain the integrity of our promise to honor their requests. In each alum's record, TCCs can view an alum's permissions to publish their personal and professional contact information in M-Track. If an alum has requested that their information *not* be published in iImpact, Alumni Relations asks that TCCs respect that and not publish said contact information in any other manner.

In general, alumni contact information must not be shared with those persons not given the authority from Alumni Relations to access the information. Any requests for such access must be forwarded to our office.

Global Email

In order to monitor the amount of email our alumni receive, Alumni Relations would like to be copied on mass emails sent to club constituents.

Using the Club Management Module

As a Trusted Club Contact, you can:

- Add a member to your club.
 - Edit a member's contact information (including home, work and email addresses) by clicking on the member's name in the club member list.
 - View date stamps next to name and address entries to assure inclusion of most recent contact information.
 - Download club member information for import to spreadsheets, etc.
 - View a list of expired members.
 - Edit the club's web page URL and club's email address
 - Enter and edit club events.
 - Send email to all club members, or to sub-sets of the club (dues-paying members or expired members, e.g.)
 - Download email lists of all club members, or sub-sets of the club
 - Update work industry and function.
-

Where to Go

<http://www.bus.umich.edu/ClubManagement>

Adding a Member

- Click **Add Member**.
 - Enter first name (optional) and full or partial last name. Click **Search**.
 - Click on the name of the person you want to add.
 - Fill in member information. Click **Submit**.
-

Editing Member Information

- To edit a member's information, including work, home and email addresses, click on their name in the member list.
-

Downloading Member Information

(For import to spreadsheet, etc.)

- Click **Download**.
- Select the type of information you wish to download for each member.
- Click **Download Now**.
- Follow the instructions for saving the file to your computer.

Note: To download email lists, see "Emailing Members" below

Viewing Expired Members

- Click **Expired Members**. A list of expired members is displayed.

Note: To email all expired members, see “Emailing Members” below.

Entering and Editing General Club Information

- Click **Edit Club Info**.
- Enter or edit club information. Click **Submit**.

Note: The club name, city, state, and country fields are not editable. If any of these are not correct, contact Alumni Relations at alumni@umich.edu or 734.763.5775.

Entering Club Events

- To add an event, click **Club Events**, then **Add Event**.
- Fill in event information. Click **Submit**.

Editing Club Events

- To edit an event, click **Club Events**, then click **Edit** next to the event listing.
- Edit event information. Click **Submit**.

Deleting Club Events

- To delete an event, click **Club Events**, then click **Delete** next to the event listing.

Emailing Club Members

- Click **Email**.

To email members:

- Select the group(s) you wish to email. Click **Compose Email**.

Note: Email messages will be sent through iMPact, which sends in plain text and doesn't allow attachments. When sending email to a group, the names will be placed in a BCC list and will not appear on the **Compose Email** screen.

- Compose your message and click **Send**.

To download email list of members:

- Select the group(s) you wish to email. Click **Download List**.
- Follow the instructions for saving the file to your computer.

Club Website Description and Instructions for Launch

Description and Benefits

The new club website template was created to allow clubs a more interactive presence on the web. The new template is based on the existing class websites and includes message boards for club members to post personal and professional information about themselves. The club website is also integrated with the club management module, which allows only club members to post information on the website. However, all alumni with an iMPact password can view information on the site.

Launching the New Website for Your Club

The club needs to **contact Melanie McIntyre** (melrm@umich.edu) to initiate the process of creating the website. Club leaders should **designate a club member or officer as the webmaster** – someone who updates the website when needed and manages its usage. Because some of the content is tied to the club management module, this person will also need to become a **Trusted Club Contact** and will have access to all member data. This person will work closely with Melanie to create the content for the new website, populate the events calendar and ready the site for launch.

To view a **live club site**, visit the Chicago Club's website at <http://webuser.bus.umich.edu/Clubsites/Chicago>.

For more information about launching the new club website for your club, contact **Melanie McIntyre** at melrm@umich.edu.

Planning Programs & Events

All alumni clubs, whether large or small, new or established, rely on programs and events to draw alumni to their organization. To ensure that our clubs remain active and vital, Alumni Relations requires that all small clubs hold at least one event per year. All large clubs are required to hold at least four events annually.

Successful events depend on a number of factors; several are listed below. In addition, see Tab 10 for a sample event-planning checklist.

Resources

First, what financial resources are at your disposal? Established clubs with their own funds obviously have more latitude when planning events. However, even new clubs can design events whose costs are covered through admission fees and some assistance from the Business School.

Objectives

Next, the club's objectives for the event should be clearly defined: Is this a professional networking opportunity, or is the aim primarily social interaction? Is professional development and lifelong learning the goal? Is the event an opportunity for the club and its members to become involved in public service efforts in your community?

Target Audience

In addition, a successful event requires a clear understanding of your target audience. A Happy Hour at a local bar is unlikely to attract senior alumni. Conversely, a presentation by a popular Business School faculty member may draw alumni from a wide range of classes.

Volunteer Support

Most important, a successful event requires a dedicated event manager and a team of enthusiastic volunteers who plan carefully, publicize thoroughly and follow through reliably.

The following types of programming have been introduced by several of our clubs with great success. Please follow up with the individual clubs listed below for more information.

- | | |
|---------------------------------------|-------------------------|
| ▪ Professional Development Programs | Detroit, San Francisco |
| ▪ Professional Networking Groups | Denver, Atlanta |
| ▪ Lifelong Learning Workshops | Detroit |
| ▪ Social Activities/Social Networking | New York, San Francisco |
| ▪ Community Service Activities | New York, San Francisco |
| ▪ Happy Hours for Current Students | Minnesota |

- Receptions for Prospective & Admitted Students

Boston, Hong Kong

Michigan Business School Alumni Clubs

Events Planning Checklist

Date of Event: _____ Time: _____

Alumni Club: _____

Club Contact: _____

Title of Event: _____

Speaker(s)/Special Guest(s): _____

Location: _____

Directions, if necessary: _____

3-6 months before the event

Make room reservations.

___ Provide payment information to hold room

Credit Card and number: _____

Owner of card: _____

___ Give estimate of attendance: _____

___ Date to cancel event without penalty: _____

___ Date to provide final attendance figure: _____

___ Review, sign and return contract

Make room arrangements.

___ Arrange seating for presentation (theatre style, tables, etc.): _____

___ Arrange separate space for reception and networking (room to mingle)

- ___ Request skirted registration table
- ___ Request podium, if needed
- ___ Request microphone
- ___ Contact speaker to determine AV and other equipment needs; place order
- ___ Order flowers
- ___ Request menu
- ___ Other special requests: _____

2-3 months before the event

Design invitations.

- ___ Alumni club sponsor
- ___ Ask speaker for a professional bio or CV
- ___ Ask speaker for title and description of his/her presentation
- ___ Date, time and location
- ___ Note refreshments, hors d'oeuvres, cash bar, as appropriate
- ___ Event participation fee, if any: _____
- ___ Payment information (to whom checks are payable, credit cards accepted)
- ___ RSVP instructions (date, name and phone/email of event contact, web address if registration is online, etc.)
- ___ RSVP information required from invitee
 - ___ Name (as it will appear on nametag)
 - ___ Degree and year, if UM alum
 - ___ Guest's name
 - ___ Email address for event updates and club mailings
 - ___ Permission to include on networking list to be distributed at event

Arrange for printing of invitations.

- ___ Name and contact information of printer: _____
- _____
- _____
- Number of invitations ordered: _____

- ___ First proof reviewed. Date: _____
- ___ Second proof reviewed. Date: _____
- ___ Final proof approved. Date: _____
- ___ Date invitations will arrive from printer: _____

6-7 weeks before event

Arrange catering.

- ___ Determine catering budget: _____
- ___ Order hors d'oeuvres, other refreshments
- ___ Order beverages (coffee, tea, bottled water)
- ___ Order a cash bar, if appropriate
- ___ Ask for revised Event Order and check carefully
- ___ Sign and return Event Order to hotel

Arrange photography.

- ___ Select a photographer.
 - Name: _____
 - Contact information: _____
 - _____
- ___ Photographer's contact at club event
 - Name: _____
 - Contact information: _____
- ___ Specific instructions for photographer
 - Arrival time _____ Departure time _____
 - Special subjects _____
 - Final format (contacts, prints, slides, etc.) _____
- ___ Give photographer billing and delivery information
 - Bill to: _____
 - Billing address: _____
 - Mail or deliver to: _____

Mailing or delivery address: _____
_____ Estimated date of delivery _____

3-5 weeks before the event

Process RSVPs.

_____ Create Excel spreadsheet
_____ Monitor attendance with regular reports
Report dates: _____

_____ Send follow-up email communications to invitees
Dates: _____

Design program

_____ Determine who will speak at the event and in what order:
Alumni host: _____
Introduction of speaker (if different): _____
Alumni Relations speaker (if present): _____
Official speaker: _____
Concluding remarks: _____
_____ Forward speaker's bio or CV to introducer

Purchase gifts and prepare materials.

___ Purchase and mail gifts for speakers and/or hosts
Amount: \$ _____ Date sent: _____
Mailing address: _____

___ Request materials from Alumni Relations for registration table

- ___ Business School banner (if needed)
- ___ Address update forms
- ___ Markers for nametags
- ___ Pens
- ___ Alumni Opportunities/Alumni Services sheets (if available)
- ___ 3-4 issues of most recent Dividend
- ___ 3-4 issues of most recent MSJ, if available
- ___ Information about local alumni club and upcoming activities
- ___ Information about Reunion and Reunion committees
- ___ Provide mailing address and precise delivery instructions for registration package(s)

The week of the event

Finalize attendance information.

- ___ Run and distribute final report.
- ___ Contact hotel/caterer with final numbers.
- ___ Touch base with photographer.

Finalize materials.

- ___ Create final attendance roster for registration table
 - ___ Create networking lists for distribution at event
 - ___ Arrange nametag production with vendor and forward Excel file with final list of attendees
- Vendor: _____
- Contact: _____
- Date due: _____

Event follow-up

- ___ Send thank-you note to featured speaker
- ___ Process address changes collected at event
- ___ Create final attendance list with updated contact information for file
- ___ Solicit feedback from attendees about event
- ___ Scan photos and forward, with captions, to Alumni Relations for website
- ___ Forward actual photos with captions to Alumni Relations for publication in *Dividend* magazine, along with a brief summary of the event

Promotional Strategy for Business School Alumni Clubs

Objective: To inform the Business School community about alumni activities and brand-building efforts around the world; to give individual clubs recognition and publicity within the Business School and within the wider Business School and UM alumni communities; and to promote and encourage alumni, faculty and student participation in and affiliation with alumni clubs for professional and social networking and lifelong learning.

If you would like your club activities promoted, Alumni Relations is happy to include them in *MichiganMail* (which goes out every other month), *Dividend* magazine and the *Monroe Street Journal*, as appropriate. Send promotions to Melanie McIntyre at melrm@umich.edu.

Alumni Involvement Opportunities

ALUMNI RELATIONS

Day in the Life (DITL) – www.bus.umich.edu/DayInTheLife

Students learn more about a company, career and industry from Business School alumni. Host a first-year MBA or BBA student for a day at your company. For more information, contact Alumni Relations at alumni@umich.edu.

Event Hosting/Sponsorship

Alumni Relations needs alumni or their companies to host or sponsor events/receptions in their area. For more information, contact Alumni Relations at alumni@umich.edu.

Reunion 2004

Alumni weekend, Annual Business Conference, and structured social events planned around a home football game. Reunion 2004 will be celebrated October 8-10, 2004. This year, we are especially celebrating the Classes of '54, '64, '79, '84, '94, '99 and '03. If you are a member of one of these anniversary classes, and would like to help plan Reunion 2004 activities, contact Julie Antisj at antisj@umich.edu.

Willing to Counsel

Alumni Relations is seeking alumni who would be willing to counsel prospective students, current students, or alumni regarding the Business School experience and/or career opportunities. For more information, contact Alumni Relations at alumni@umich.edu.

CONFERENCES & SYMPOSIA

Asian Business Conference – www.umich.edu/~asiabus

Brings together government officials, business leaders, and leading academics to discuss the challenges and opportunities of doing business in Asia. Business School alumni with an interest in Asian business are welcome to inquire more about ABC by visiting their website.

Black Business Student Association (BBSA) Annual Conference & Alumni Weekend – www.umich.edu/~bbsa

BBSA and alumni work together to plan a full weekend of panel discussions, prospective student events, and industry presentations. For more information, visit their website listed above.

FuturTech Forum – www.futurtech.org

The FuturTech Forum is the annual conference on emerging technologies hosted by the High-Tech Club at the Business School. For more information, visit their website listed above.

Latin American Business Conference – webuser.bus.umich.edu/Organizations/hlbsa

The Conference features a diverse group of business executives and leading scholars in panel sessions sharing their business experiences in Latin America. For more information, please visit the Hispanic and Latin Business Student Association website listed above.

Women in Leadership Conference – www.umich.edu/~mbwclub

Since 1993, the Business School and the Michigan Business Women club have sponsored a major women's leadership event at the School each year, featuring prominent women business leaders, panel discussions and skill-building workshops. For more information, visit the Michigan Business Women club website listed above.

BUSINESS SCHOOL DEPARTMENTS & RESEARCH CENTERS

Corporate Environmental Management Program (CEMP) – www.umich.edu/~cemp

Opportunities exist for students and faculty to work with public and private enterprises on course projects, independent studies and summer internships on environmental management and sustainable development issues. To get involved, please contact Andrew Horning, Managing Director, at 734.647.9709 or ahorning@umich.edu.

Executive Education – execed.bus.umich.edu

Executives know that the key to continuing job success is continuing education; the Executive Education Center offers the programs that can help you achieve success in every aspect of your professional life. For more information on specific programs, visit the Executive Education website.

Multidisciplinary Action Projects (MAP) – webuser.bus.umich.edu/programs/map

MAP is Michigan's flagship project course in the MBA Program, partnering students and businesses together each March and April. Students travel throughout the United States in teams of five to six students to work on-site with companies to solve real business problems. If you would like more information on how to sponsor a team of students, please contact Gale Amyx, MAP Program Manager, at gamyx@umich.edu.

Samuel Zell & Robert H. Lurie Institute for Entrepreneurial Studies – www.zli.bus.umich.edu

Alumni are invited to participate as a panelist or attendee at Entrepreneurial events hosted throughout the year. In addition, alumni may choose to host a summer intern at their start-up or venture capital firm, participate as a judge at our spring Business Plan Competition, present venture capital investment opportunities to our student-led Wolverine Venture Fund, or serve as a mentor for tech transfer independent study projects. For more information please contact the Institute at 734.615.4419 or zlicontact@umich.edu.

Tauber Manufacturing Institute (TMI) – www.tmi.umich.edu

Those interested in sponsoring a TMI team project for Summer 2004 should contact Team Project and Recruitment Manager Linda Grischy (lindag@umich.edu). Visit the TMI website to learn more.

William Davidson Institute (WDI) – www.wdi.bus.umich.edu

There are three main international project opportunities within the University of Michigan Business School – Global Projects I (IMAP), Global Projects II, and Global Projects III. Students travel abroad in teams of five to six students to work on-site with companies to solve real business problems. All are created and managed by the William Davidson Institute, with each offering an impressive array of corporate, entrepreneurial, environmental and non-profit related project options. Those interested in sponsoring a team of students, should contact Andy Lawlor, Director of Global MBA Projects at alawlor@umich.edu. For more information, please visit the WDI website.

STUDENT CLUBS & ORGANIZATIONS

Alumni are always welcome to get involved with any Business School student club or organization. For more information, visit the Organizations webpage in iMPact at www.bus.umich.edu/Organizations.

For a complete listing of all involvement opportunities available at the Business School, visit Alumni Relations' Involvement Opportunities page at www.bus.umich.edu/AlumniCommunity/Involvement.htm.