RALLY YOUR REGION!
TIPS AND TRICKS FOR NEW LEADERS

CORA CONFERENCE CALL
APRIL 6, 2016
Bheki Gwamanda ‘97
Princeton Alumni Association of Canada

Yan Zhong ’07
Princeton Club of Western Washington

Committee on Regional Associations
OVERVIEW

• **Transition**
  (or “What did I just get myself into?”)

• **Bylaws and Governance**
  (Setting up a successful structure)

• **Goals**
  (What do you hope to achieve in 3 months? 6 months? 1 year?)
TRANSITION

“Ch-ch-ch-ch-changes...” – David Bowie

Photo: Princeton University, Office of Communications.
TRANSITION I

Buy your past officers coffee, and find out:
What has worked well? What didn’t work well?

• Understand your membership
  ➢ Demographics, past event attendance

• Engage volunteers (both current and new)
  ➢ Retirees, young alumni, etc.
  ➢ Diverse perspectives and experiences
  ➢ Exciting time to shape club and engage alumni

• Leverage existing relationships
  ➢ Businesses and alumni the club has worked with in the past
  ➢ Event venues
  ➢ Connections with other alumni clubs in the region (IvyPlus, etc.)—a great way to partner on events and start gauging attention/interest
Time to hand over the reins...
Make sure you have access so you can lead successfully

- **Finances**
  - Understand your 501 (c)(3) status, non-profit renewal.
  - Transfer assets, banking, and accounting data.
  - Get up to speed on insurance and financial reporting.

- **Communication**
  - Become an admin and get login information for your club e-mail account, website, and social media accounts.
  - Ensure you can send e-mails to your membership via Tigernet
    - Contact Terranze to update Tigernet regional leadership information
  - Past documents or records to keep (bylaws, constitution, etc.)
TRANSITION RESOURCES

Join the CORA Discussion Group for Regional Association Officers

Check out the Regional Officers’ Handbook

Photo: Princeton University, Office of Communications.
“Organizing is what you do before you do something, so that when you do it, it is not all mixed up.” – A. A. Milne
BY-LAWS

• Written legal document critical for:
  - Setting expectations about how the association operates
  - Decision-making and accountability
  - Adhering to policies and procedures
  - Maintaining consistency, even as volunteers rotate

• Recommend revisiting by-laws:
  - On significant changes to board officers
  - Every four years (easy way to remember if it’s time, inspired by U.S. presidential elections: a year that is divisible by 4)

• Evaluate:
  - Does your club have by-laws?
  - Last revision date?
  - Process for reviewing and amending?

Do your by-laws still make sense to the current board, in this day and age, for your club?
BY-LAWS STRUCTURE

• Name and Mission Statement
• Territory, Eligibility, Membership
• Officers
  ➢ Election, duties, terms of office, provisions (e.g. resignation, impeachment)
  ➢ Board, meetings
• Committees
• Dues, Fiscal Year
• Amendments
Best Practices: the unwritten version

• Set up a regular cadence to keep in touch
  ➢ Annual business meeting for elections, goals, new volunteers
  ➢ Regular recurring business meetings for officers and committee representatives (e.g. 1x/month, rotate between conference call and in-person). Ask for written updates if officers can’t attend.
  ➢ Agenda, poll for attendance, start/end on time, send out minutes

• Get the right volunteers in the right roles
  ➢ Combine interest, passion, learning opportunities with a volunteer’s desires, and find ways to create opportunities
  ➢ Have those difficult conversations: if volunteers are not communicative, etc. understand whether they are truly invested.

• Most of all, lead by example:
  • Be on time
  • Respond promptly (or set expectations if you can’t)
  • Get things done, ask for help when needed, but deliver
RESOURCES

Sample by-laws for Large Associations

Sample by-laws for Small Associations

Regional Association Leadership guide

Photo: Princeton University, Office of Communications.
GOALS

“With great power comes great responsibility” - Spiderman (and other luminaries)

Photo: Princeton University, Office of Communications.
GOALS

• Helps ensure everyone works toward same objectives
• Rally via high-level theme ("Renew and Revitalize", "Growth", "Momentum and Experimentation")

Actionable:
• Membership objectives
  ➢ Increase numbers
  ➢ Engagement
  ➢ Dues
• Events
  ➢ Frequency
  ➢ Cost
• Assess outcomes
GOALS

• Increase dues-paying membership
  ➢ Volunteer appreciation event to visibly thank existing and attract new
  ➢ Early event access and discounted rates for dues payers

• Increase and diversify engagement
  ➢ Customized approaches for Retirees, Professionals, Parents, Young alumni
  ➢ Events targeting each demographic
GOALS

• Conduct a members’ survey for interests and ideas

• Aim for 2-3 signature events per year
  ➢ Spring: New Admits, annual dinner
  ➢ Summer: picnic, sports game
  ➢ Fall: museum, wine tasting, theatre
  ➢ Winter: Global Networking Night

• Payment system: Paypal, check, Eventbrite, etc.

• Designate main “event contact” per event
GOALS

• Target Easy Events (TEE up). Events that can be set up in one phone call. Have a few in your bag of tricks.
  ➢ Social: Happy Hours, Restaurants, Ivy+
  ➢ Cultural: museum visits, recitals, plays
  ➢ Sports: Local games, mini-golf

• Know what’s going on in town
  ➢ Google alerts
  ➢ Scan social media
  ➢ Email subscriptions
  ➢ Princeton-related
GOALS

• Social: Happy Hours, Restaurants, Picnics, BBQs, Parties, Ivy+
• Professional: Ivy+ Networking, Entrepreneurship events
• Cultural: museum visits, author readings, music recitals, architecture tours, courses
• Educational: local university public lectures, request Speakers Bureau (visiting Princeton professor)
• Sports: local games, March Madness
• Schools: engage counsellors, send-off new admits
Work with your board to:

- Define what success looks like.
  - E.g. 10% increase in number of dues-paying members, 4x events a year, more diverse audiences reached, 3 new volunteers as a result of successful events, positive feedback on next year’s survey

- Determine the timeframe for the goal and how often you will assess (quarterly, yearly?).
  - Hint: Annual board meeting is a great time to kick off upcoming goal and look back!

- Keep evolving and refining your strategy toward your goal.
GOALS RESOURCES

Regional Event Programming

Events and Programming Links

Photo: Princeton University, Office of Communications.
Q&A and THANK YOU!

Photo: Princeton University, Office of Communications.
BYLAWS & GOVERNANCE

• Membership types
  ➢ Non-resident
  ➢ Term: Dues, Lapsed Members

• Meetings
  ➢ Cadence
BYLAWS & GOVERNANCE

Officers

- Composition
  - Minimum roles: president, treasurer
- Eligibility
- Terms of office
- Election
- Duties
BYLAWS & GOVERNANCE

• Composition
• Meetings
  ➢ Frequency and Quorum
• Nomination and Election
• Vacancies
• Committees
• To dues or not to dues?
  ➢ May help club offset costs and take more risks
  ➢ Benefits should be clear (e.g. discounted rates for events)
• Procedure for amending, altering
  ➢ Majority vote
  ➢ Timing (e.g. review at any time)

• *Should always be included in by-laws*