



## CLUBS & SHARED INTEREST GROUPS LEADERSHIP PLANNING & SUCCESSION TOOLKIT

This document was developed by the 2016-2017 Leadership Succession Planning Committee led by Rowena Saldarriaga Frazer AB '76, Co-chair; Iñigo Sánchez-Asiain MBA '90, Co-chair; Yaillett Fernandez AB'07, MDiv '15; and Sara Aske, HAA Liaison.

We have developed this **Toolkit** to help Club/SIG Leaders achieve superior leadership during their terms and provide organizational continuity through Leadership Succession Planning.

This **Toolkit** consists of suggestions and best practices to enable Club/SIG leaders to realize the following goals:

- Provide effective leadership to help the Club/SIG **become a lasting institution** that is not defined by an individual's personality traits or preferences.
- Develop **organizational alignment with the HAA** Clubs/SIGs structure.
- Implement processes that ensure **transfer of knowledge** from one president to the next, so that the institutional knowledge and operational information developed over time by Clubs/SIGs is transferred to succeeding Club/SIG officers and we do not end up "reinventing the wheel" every term.

This **Toolkit** is laid out in four main sections:

1. **Leadership Development** This section contains suggestions for identifying potential leaders who possess attributes associated with successful leaders; characteristics to avoid; how to recruit and nurture leaders; and how to prepare Clubs/SIGs for a smooth leadership transition.
2. **Club/SIG Management** This section contains a compilation of current HAA materials with suggestions for how a leader can maximize his/her effectiveness once in office. These resources promote leadership development from organizational, financial, and process standpoints.
3. **Optimizing Transition** This section contains suggestions for alternative election approaches and how to enhance the onboarding process, so that new officers are able to get up to speed quickly and are empowered to approach their roles confidently.
4. **Club/SIG relationship with the HAA** This section contains suggestions for how to best utilize HAA resources so that Clubs/SIGs benefit to the fullest degree from the support and guidance of the HAA.

Additionally, we have included a *Challenges and Resolutions* resource section to illustrate how to manage some real-life challenging situations.

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**Disclaimer:** This Toolkit is not meant to be prescriptive or to reflect the circumstances of every Club/SIG. Instead, it offers broad suggestions and best practices. Please adopt and adapt the Toolkit to best serve the needs of your Club/SIG and your alumni community.

# 1. Leadership Development

## Identifying Club/SIG Leaders

- **Seek out candidates with integrity, enthusiasm, and time to commit to the Club/SIG.** Focus on candidates who display passion and commitment and willing to do more. Avoid self-interested people and those who demonstrate vision but lack time.
  - ⊙ For other considerations, review the “Developing an Effective Board and Board Leadership” section of the Core Competency Model.

## Recruiting Candidates

- **Recruit people from within.** Actively develop potential candidates for transition into a leadership role. Promote someone into a leadership role after he or she understands the operations and dynamics of the Club/SIG and its relationship with the HAA. In general, and, certainly in more established Clubs/SIGs, recruiting for the Executive Committee from the Board is preferable. In some cases, a former Board member might be a good choice for president, too.
  - ⊙ Only degree-holding Harvard alumni and associate members who have completed executive education courses recognized by the HAA permanently and residing in the assigned area (in the case of Clubs) may serve as a Board member or President, nominate candidates, and vote in elections of the local Harvard Club.

## Nurturing Leaders

- **Use the Board to nurture candidates.** Preferably, presidents should serve on the Board right before becoming president. Think of the Board as a leadership training ground and promote candidates from your current, or recent, Board. Use events to identify and attract candidates, and encourage the group’s most active members to join the Board.
- **Nurture several candidates at a time.** Continuously nurture more than one potential candidate so that, when the time comes, your organization has seasoned leaders who have been exposed to the Club/SIG and are ready to take on a more prominent leadership role.
- **Test real commitment beforehand.** Expose potential candidates to the Board and its processes. Allow leading members to organize events and assume other active leadership roles. Prevent non-active alumni from joining the Board, even if they are insistent. Instead, give non-active alumni smaller responsibilities and have them build competency by acquiring greater roles within your organization. For Clubs/SIGs with a chapter structure, the Board of a chapter is a great training ground for potential leaders for the umbrella Club/SIG.
- **Become personally engaged in the process.** As the election approaches, have a one-on-one conversation with potential candidates to assess their level of commitment. Schedule these meetings in person, via video or Skype, or by phone.
- **Assume that candidates may change over time.** Always keep in mind that a candidate’s level of commitment and availability may change over time, so a person who is an ideal candidate today might not be so tomorrow.
- **Consider creating committees with the goal of nurturing future leaders.** For example, create committees to run events for smaller sections of your membership base (organized by school, life stage, etc.) and staff them with potential leaders.
- **Consider recruiting active members from standing committees and Schools and Scholarships interviewers to join the Board.** Interviewers and committee members, e.g., Schools and Scholarship, House, Programs, Athletics or any other committee can be a source of new talent.

## Enhancing Team Effectiveness

- **Encourage the leader to cultivate a strong working relationship with the Board and to distribute responsibilities to enhance Board members’ sense of ownership for the success of the Club.** As these are volunteer positions, it is difficult for a president to succeed without the support and hard

work of his or her Board. Therefore, when selecting a new officer, ensure that he or she will work in partnership with the rest of the Club's/SIG's leadership. This can be aided by ensuring the Board and committees have buy-in for any succession.

- ⦿ **Consider double-teaming key roles on the Board.** That way, the Board's business does not depend on the professional and personal circumstances of one individual.

### **Preserving the Integrity of the Board**

- ⦿ **Add a conflict of interest clause to your Bylaws.** Require a current signature of anyone assuming a leadership position in your Club/SIG.
  - ⦿ Please keep copies of these documents on file.
- ⦿ **Develop a system of checks and balances to combat cronyism.**
  - ⦿ Potential issues of cronyism can usually be controlled or prevented by a well-balanced and diverse Board which has the authority to elect incoming Board members. If your Board does not currently represent your community, consider the demographic breakdown of your alumni community and actively recruit and nurture a diverse group of candidates for future positions in the Board.
    - See the HAA Diversity Statement in the [Best Practices Handbook](#)<sup>1</sup> and incorporate it into your Club's/SIG's bylaws.
  - ⦿ The confirmation process of Board members and the Club/SIG president at the General Annual Meeting or Assembly (see below in Onboarding and Electing procedures) also serves as a check on cronyism.
- ⦿ **Add a clause to your Bylaws for the removal of any officer convicted of a crime, with a statement that exempts officers whose crimes are strictly of a political or ideological nature.** If an Officer is accused or indicted, or credible allegations come forward, the Club/SIG should place that Board member on administrative leave effective immediately, pending the investigation and/or proceedings.
  - ⦿ When an officer is convicted or accused of a crime, it is important to respond quickly and remove him or her from the Board in order to get the Club/SIG and Harvard out of the entanglement. At the same time, it is important to differentiate between officers who are persecuted for their ideas or political views.
  - ⦿ If a situation arises that triggers or has the potential to trigger this clause in your Bylaws, consult with your HAA Director for Clubs & SIGs and the HAA on a case-by-case basis until the crisis is resolved.

## **2. Club/SIG Resource Management<sup>2</sup>**

### **Supporting Fellow Officers<sup>3</sup>**

- ⦿ **Connect with the [HAA Director for Clubs & SIGs](#) for best practices and to stay abreast of new resources and leadership development opportunities through the HAA.**<sup>4</sup> In addition, your Director is available to discuss and help you find solutions to Club/SIG issues and challenges.
- ⦿ **Actively mentor Club/SIG officers.** As a Club/SIG leader, you want to perform as a highly effective leader and this includes providing guidance and resources to your fellow officers to enable them to function at a high level as well.
- ⦿ **Encourage Club/SIG officers to familiarize themselves with the [Harvard Clubs and SIGs Officers' Lounge](#).**<sup>5</sup> The Officers' Lounge contains information about the HAA leadership conferences, relevant

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<sup>1</sup> Link, Best Practices Handbook: <http://officerslounge.clubs.harvard.edu/article.html?aid=126>

<sup>2</sup> In the event that a hyperlink in this section or in the Toolkit stops working, please notify the HAA Clubs and SIGs team at [clubs@harvard.edu](mailto:clubs@harvard.edu).

<sup>3</sup> You might need to log in via the HarvardKey system to access some of the materials in this Toolkit. If you need to claim your HarvardKey, please visit: <https://key.harvard.edu/>.

<sup>4</sup> Link, HAA Director for Clubs & SIGs: <https://alumni.harvard.edu/haa/clubs-sigs/overview/directors>

<sup>5</sup> Link, Harvard Clubs and SIGs Officers' Lounge: <http://officerslounge.clubs.harvard.edu/>

tax and insurance information, sample Bylaws and governing documents, tips and tricks for creating successful programs and events, suggestions to help start or revive a Club/SIG, and more.

- Clubs/SIGs should be aware of and follow any laws and regulations appropriate to their region or country. International Clubs/SIGs are required to abide by their local laws and regulations. Be sure to include this information in the RunBook. (A “RunBook” is the name typically used by software companies to refer to their policies and procedures manual. It is the “Go To” source of information for how an organization is run. For more information and a sample about the RunBook, please refer to section 3, under Ensuring Continuity.)
- **Share resources with Club/SIG officers.** The following resources will answer questions you may encounter during the course of your term and will provide you with ideas to empower your officers.
  - **HAA Online Management Resources:** Become familiar with and utilize HAA online resources. These cover a wide range of management functions.
    - [HAA Club Officer Handbook](#): A nuts-and-bolts guide for alumni who are leading, reviving or starting a Harvard Club.<sup>6</sup>
    - [SIG Manual](#): A set of general guidelines and information for alumni interested in establishing a SIG as well as a resource for currently existing SIGs.<sup>7</sup>
    - [HAA Best Practices Handbook](#): An all-purpose resource guide designed to help Club/SIG leaders manage their organizations, plan and execute events, and address operational and organizational needs.<sup>8</sup>
    - [Harvard Club/SIG Sample Bylaws](#): A basic template that can be followed or modified as necessary when a Club/SIG needs to develop, review, or update a set of Bylaws.<sup>9</sup>
    - [Harvard SIG Policy](#): A summary of the HAA’s guiding principles under which SIGs must operate.<sup>10</sup>
    - [Tax Information](#): A summary of pertinent tax information for US-based Clubs/SIGs.<sup>11</sup>
  - **Campus-Based Leadership Development Resources:** Emphasize to your officers the importance of attending HAA events as a means of strengthening Club/SIG leadership.
    - [HAA Alumni Leadership Conference \(ALC\)](#): A conference held every year in February for Harvard Club/SIG leaders from around the world to answer questions and to enhance leaders’ effectiveness and their organizations’ growth.<sup>12</sup> This is a great opportunity to network and develop relationships with peers in Club/SIG leadership roles throughout the world.
      - New Leaders Seminar: The goal of this program is to provide new Club/SIG leaders with best practices, useful resources, and helpful information in order to make the most of their leadership role and have a positive impact on their Club or SIG.
    - Attend Regional meetings, as appropriate: [Asia-Pacific Club Leaders Meeting](#), [Latin American Club Leaders Meeting](#) and [European Club Leaders Meeting](#).<sup>13</sup>
    - [Ask the HAA](#): Regular conference calls hosted by the HAA staff for Club/SIG leaders to learn about effective strategies, Best Practices, and successful program ideas.<sup>14</sup>
    - [Alumni Magnet Training Sessions](#): The AlumniMagnet staff periodically holds training sessions to help boost Club/SIG officers’ web management skills.<sup>15</sup>
- **Follow the HAA on Social Media.**
  - Please refer to Section 4 for HAA Social Media Contact Information.

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<sup>6</sup> Link, HAA Club Officer Handbook: <http://officerslounge.clubs.harvard.edu/article.html?aid=105>

<sup>7</sup> Link, SIG Manual: <http://officerslounge.clubs.harvard.edu/article.html?aid=106>

<sup>8</sup> Link, HAA Best Practices Handbook: <http://officerslounge.clubs.harvard.edu/article.html?aid=126>

<sup>9</sup> Link, Harvard Club/SIG Sample Bylaws: <http://officerslounge.clubs.harvard.edu/article.html?aid=114>

<sup>10</sup> Link, Harvard SIG Policy: <http://officerslounge.clubs.harvard.edu/article.html?aid=110>

<sup>11</sup> Link, Tax Information: <http://officerslounge.clubs.harvard.edu/article.html?aid=118>

<sup>12</sup> Link, HAA ALC: <http://officerslounge.clubs.harvard.edu/article.html?aid=101>

<sup>13</sup> Links, Asia-Pacific Club Leaders Meeting: <http://officerslounge.clubs.harvard.edu/article.html?aid=102>; Latin American Club Leaders Meeting: <http://officerslounge.clubs.harvard.edu/article.html?aid=104>; European Club Leaders Meeting: <http://officerslounge.clubs.harvard.edu/article.html?aid=103>

<sup>14</sup> Link, Ask the HAA: <http://officerslounge.clubs.harvard.edu/article.html?aid=270>

<sup>15</sup> Link, Alumni Magnet Training Sessions: <http://officerslounge.clubs.harvard.edu/article.html?aid=202>

### 3. Optimizing Board Management and Transition

#### Building Your Board

##### ● Board

- ⊙ Establish a process of attracting, vetting, nominating, electing, and onboarding members.  
*Onboarding:* A strategic process designed to integrate a new member into an organization through training, mentoring, and coaching.
- ⊙ A healthy Board has a well-structured onboarding process and is made-up of engaged and qualified members with different strengths. A healthy Board is key to a healthy Club/SIG!
- ⊙ There are many sound ways of onboarding and selecting qualified members to a Board. Here are some suggestions:
  - **Expose alumni to your Club/SIG and vet them.** Under normal circumstances, alumni should have been involved actively with the Club/SIG before becoming a candidate to join the Board. It is important that alumni's integrity and willingness to devote time to the organization are proven. Confirm alumni's willingness to actively participate in Club/SIG life beforehand and prevent non-active alumni from joining the Board, even if they persistently request to do so.
  - **Structure the Board to best promote the Club/SIG's most important goals and activities.** Nominate one or several VPs to balance the workload and responsibilities and to backup and support each other as necessary. Focus on candidates who are most actively involved. As a best practice, each Board Member should take ownership of a program or strategy during his or her term.
  - **Recruit and nurture a diverse Board.** Actively recruit alumni who are diverse in terms of age, schools, gender, interests, etc. Nurture a varied lot so that you get qualified candidates from different backgrounds.
    - Survey new members' interests and take advantage of that knowledge to build engagement and get new people involved in the Club/SIG.
  - **Encourage Board members to identify new Board member candidates that possess the expertise, skills, or competencies lacking within the current Board.**
  - **Establish a formal recommendation or nomination process for new Board members.** If your organization has a Nominating Committee, the Nominating Committee should recommend members to the Board.
    - Consider establishing a Nomination Committee. Some Clubs/SIGs have a Nomination Committee as part of the Board to recommend new Board members, provide input on candidates' qualifications and to guide the selection process.
    - Ensure that the Nominating Committee, like your Board, is representative of the demographics of your Club/SIG community.
  - **Establish a process of checks and balances within the Board that includes stop gaps to avoid any undesired situations.**
    - Add a code of conduct for Board and general members to the Bylaws
  - **Document in your Bylaws the process by which a member joins the Board.** Your Bylaws should include guidelines for who is eligible to join the Board and how a member is nominated, elected, and confirmed in your Club/SIG, the length of the board term, and the number of allowable Board term renewals. Also, include a clause about removal of a Board member.
  - **It is advisable that new Board members are confirmed through a process at the Annual General Meeting, or a similar event, that incorporates the input of all members who wish to participate in this process.** Board members may be confirmed either in-person or through an online process.

- If a US-based Club/SIG has filed an IRS Form 990, it is required to hold an annual meeting. International Clubs/SIGs are required to abide by their local laws and regulations.
  - **Limit the length of the term of a Board member and the number of terms a Board member may serve.** State these limits in the Bylaws, with language to accommodate extenuating circumstances.
  - **Establish a culture in the Board that welcomes and encourages the contributions of new members to the Board.**
  - **Reinforce your Club/SIG legacy by keeping past officers involved.**
    - Consider giving past presidents a key role once they step down. Maintaining past presidents on the Board or adding them to a Club/SIG Executive Committee can be a win-win situation all around. Past presidents are experienced Club/SIG members and can provide insight and assistance. They can also contribute to a smooth transition of knowledge and procedures. However, if the transition, took place in a disruptive manner, the Board should use its judgment regarding continuing involvement.
  - **Encourage prospective Board members to increase their level of involvement in the organization.** Over time, ask for greater involvement at Board meetings or events.
  - **Define the roles of Club/SIG leaders.** Draft and share job descriptions and expectations for each position. For a more productive use of the Board structure, provide the most active members of the organization with leadership opportunities such as serving as vice presidents, Committee Chairs, Membership Chairs, etc.
  - **Add information about the organization's leadership transition process to the Bylaws.** Clearly spell out in the Bylaws all policies related to Board member qualifications and the election and onboarding processes.
    - Be sure to review your Bylaws and update as needed to ensure that they incorporate key governance processes, e.g., President, Officer, Board elections, term limits, successorship/replacements, virtual voting, annual meeting specifics, etc.
    - The integrity of Club/SIG governance is dependent on simple and sound Bylaws.
- **President**
- ⊙ **Use Board membership and other leadership roles to train future presidents.** Whenever possible, the president should come from the Board after years of growth through this experience. Although it may seem more democratic to have the process open to all alumni, in practice, a successful and smooth leadership transition and transmission of knowledge can be best achieved when candidates are selected from the Board.
    - Consider adding the position of President-Elect or First Vice President so that this president-in-training shadows the president. Establishing a system with co-presidents may work well and allow co-presidents to tag-team while tending to Club/SIG and general responsibilities.
    - Voting on Board candidates should occur at the Annual General Meeting, or equivalent annual event, in-person, or through an online process.
  - ⊙ **Electing the President.**
    - Only degree-holding Harvard alumni and associate members who have completed executive education courses recognized by the HAA should be invited to participate in the election of the president, either at the Annual General Meeting or through an online process. (Clubs only: These alumni must also reside in the assigned area.)
    - Depending on the system selected by the Board, and when stated in the Bylaws, a president can be nominated in one of the following ways:
      - A self-nominated candidate from the Board.
      - A candidate nominated by the Board.
      - A candidate nominated by the Nominating Committee.

## Limiting the Lengths of Board and Officers' Terms

### ● President's Term

- ⊙ **Consider limiting the length of the president's term.** Although there is no unanimous view amongst current Club/SIG officers, there is a general consensus that there are benefits to limiting presidential terms.
  - According to the HAA Operating Guidelines, Harvard Club/SIG presidents shall not serve more than three consecutive years. Longer or additional terms must be discussed with, and receive consent from, the HAA Directors for Clubs & SIGs or the HAA.

### ● Board Member's Term

- ⊙ **Ensure that the President and the Board do not change at the same time.** A staggered transition will help preserve institutional knowledge.
  - Designate different term lengths for the positions of president and Board member.
- ⊙ **Establish a fixed term for Board members.**
- ⊙ **Rotate or renew a few members of the Board every year.** Fresh ideas and perspectives will enrich the conversation around strategies and goals of the Club/SIG.
  - Determine the number of Board members that have to rotate yearly.
  - Ensure that the composition of the Board includes opportunities for new members to become officers and participate in the Board. There should be language to this effect in the Bylaws. Specify in the bylaws your Club/SIG's expectations for new members to join the Board and follow the process established in the bylaws.
- ⊙ **Stagger the changing-of-the-guard within the Board.** Similarly, it is recommended that all members of the Board's leadership team, including the president, not change at the same time. Board members' terms should be staggered, so that the full Board not change at the same time. This will help preserve continuity in the Club/SIG.

## Running an Election

### ● Ensure that a well-defined process is in place, stated in your Bylaws, and known to Club/SIG members.

Election processes will vary depending on the size of your Club/SIG.

- ⊙ Access vs. Proximity: Electronic voting allows for a greater number of voters from the Alumni Community to participate in the election process. In-person voting at the General Annual Meeting, or equivalent annual event, offers greater opportunity for personal interaction.

### ● Communicate all nomination and election announcements and highlight deadlines and eligibility requirements to all voters with advance notice.

### ● Running the Nomination Process

- ⊙ The alumni community should be informed of the requirements to nominate a candidate. State these in your Bylaws and elections announcement.
  - Only degree-holding Harvard alumni and associate members who have completed executive education courses recognized by the HAA permanently residing in the assigned area may nominate candidates in elections of the local Harvard Club. Only degree-holding Harvard alumni as recognized by the HAA may nominate candidates in SIG elections.
  - Define any other requirements as stated in the Bylaws.
- ⊙ Encourage members to justify their nominations and to check in with their nominees to ensure that they are able and willing to commit to the leadership position in the Club/SIG.
  - The Nominating Committee and/or the Board should reach out to all nominees and confirm their availability and interest as part of the process of due diligence before the final list of candidates is publicized.
  - Ask nominees to share with the Nominating Committee and/or the Board a brief profile and a statement of goals.

### ● Voting

- ⊙ State voting eligibility requirements clearly.
  - Only degree-holding Harvard alumni and associate members who have completed executive education courses recognized by the HAA permanently residing in the assigned area may

vote in elections of the local Harvard Club. Only degree-holding Harvard alumni and associate members who have completed executive education courses recognized by the HAA may vote in SIG elections.

- Define any other voting requirements based on the definition of membership and the appropriate voting rights as stated in your own Club/SIG Bylaws.
- Voting may occur in-person or virtually, according to your Club/SIG's Bylaws.

### Ensuring Continuity

- **Develop resources for a successful transition.** Put together a *RunBook* or transition document for the Club/SIG that contains the knowledge gained over time in your organization and the procedures that have been used for its operations. This will help ensure an organized transfer of knowledge.
- **Items that should be included in a *RunBook*:**
  - ⊙ Mission and institutional history of the Club/SIG
    - Keys for success
  - ⊙ Structure/organization of the Club/SIG
  - ⊙ Board duties
    - Qualifications required to become an officer (Board member/president)
  - ⊙ Onboarding procedures
  - ⊙ Election procedures
  - ⊙ Term periods for Board members and officers
  - ⊙ Key people currently involved and their contact information
  - ⊙ Critical information that needs to be transferred (such as bank, financial, insurance, and tax-related information)
    - Key deadlines throughout the year
    - The president and one more member of the Executive Committee should have access to all Club/SIG accounts and passwords at all times. That member of the Executive Committee also should have signing privileges to all Club/SIG's bank accounts.
    - Do not include passwords or other highly sensitive information in the *RunBook* but do transition this information as well. If you must put highly sensitive information in writing, do so on documents stored elsewhere.
  - ⊙ Key policies, procedures and knowledge
  - ⊙ Institutional memory (details related to past and future events, the Club's/SIG's successes and lessons learned, relevant anecdotes, key dates, etc.)
  - ⊙ Relationship with the HAA
    - HAA services, resources, key contacts
  - ⊙ Key Documents (e.g., Articles of Incorporation, Bylaws, copy of Annual Report)
- **The *RunBook* should be kept confidential and shared only with officers or Committee Chairs who have a need for this information.**
- If your Club/SIG does not currently have a *RunBook*, this [Sample RunBook](#) is provided for your reference.<sup>16</sup>

## 4. Leveraging HAA Resources for Your Club/SIG

A Club/SIG leader is the key member of the immediate community of a Club/SIG. Your leadership role also links you in a unique way to the greater HAA community – a community that extends beyond your immediate geographic or interest area and includes the [HAA Director for Clubs & SIGs](#),<sup>17</sup> other Club/SIG leaders, school-specific alumni offices and leaders, University Centers and Initiatives, and HAA Staff. The more you engage with the greater HAA community, the more rewarding and effective your leadership role will be.

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<sup>16</sup> Link, Sample *RunBook*: [http://officerslounge.clubs.harvard.edu/images.html?file\\_id=t3NK4moAenc%3D](http://officerslounge.clubs.harvard.edu/images.html?file_id=t3NK4moAenc%3D)

<sup>17</sup> Link, HAA Director for Clubs & SIGs: <https://alumni.harvard.edu/haa/clubs-sigs/overview/directors>



## Engaging with the broader HAA Community

### ● Build Relationships.

- **Help officers see the value of working together with the HAA.** Emphasize the importance of engaging with the broader HAA community as a means of strengthening the leadership of the Club/SIG. For HAA contact details, visit the [HAA Staff Directory](#).<sup>18</sup>
  - **Promote the HAA New Leaders Seminar for new Board members.** Be clear about the expectations of officers' positions. Encourage your newly elected leaders to participate in the HAA New Leaders Seminar at the [Alumni Leadership Conference \(ALC\)](#) in Cambridge.<sup>19</sup>
  - **Develop a strong working relationship with your HAA Director for Clubs & SIGs.** Your HAA Director for Clubs & SIGs is prepared to be a resource for you in matters of leadership succession, leadership planning, and Club/SIG operations. Reach out to him or her!
  - **Collaborate with other HAA groups.** [Clubs](#)<sup>20</sup> and [SIGs](#)<sup>21</sup> drawing from the same membership pool should aim to collaborate and support each other's programs and events as appropriate.
  - **Strengthen the Club/SIG's relationship with your local Schools and Scholarships Committee.** Encourage your officers to attend meetings and serve on the Board of the Schools and Scholarships Committee and vice versa.
  - **Build relationships with the presidents of [Clubs](#),<sup>22</sup> [SIGs](#),<sup>23</sup> and other Harvard Clubs** (e.g., [HBS Clubs](#),<sup>24</sup> [HKS Regional Alumni Networks](#),<sup>25</sup> [HLS Clubs and SIGs](#)<sup>26</sup>) that operate in your area or draw from your membership pool. Consider having a member of your Board own the relationship between your Club/SIG and other Clubs and SIGs active in your area. If applicable, invite one Board member of the HBS, HKS, and HLS clubs to participate as observers/ex officio members on your Board and vice versa.
  - **Build relationships with the Boards of Ivy+ groups that operate in your area.**
  - **Build strategic relationships with leaders in your local area as appropriate.** For example, international Clubs/SIGs may consider meeting with the US Ambassador for their country and granting the Ambassador and other key Embassy personnel some level of membership to their Club/SIG.
- **Integrate HAA Events and Programs into the Club/SIG Schedule.**
- **Participate in [HAA Programs and Events](#).**<sup>27</sup> List your Club/SIG events on this page via AlumniMagnet or via email by replying to the request for submissions from the HAA's monthly emails. Scroll through this page to find events and activities near you — or at locations where you are planning to travel!
  - **Take advantage of learning opportunities with [Harvard Alumni Online Learning](#).**<sup>28</sup> Go back in time and be a student again! Encourage your Club/SIG to jump into a current Harvard lecture via a curated set of (free) online courses.
  - **Host [Global Networking Night \(GNN\)](#) events.**<sup>29</sup> Arrange for your Club/SIG to connect with the global Harvard community through the Harvard Global Networking Night events, usually held in January and June.
  - **Host the Harvard Presidential Events when applicable.** These events serve as a celebration of the Harvard community for Harvard alumni, parents, family members and friends held in cities around the world.

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<sup>18</sup> Link, HAA Staff Directory: <http://alumni.harvard.edu/about-haa/staff>

<sup>19</sup> Link, HAA ALC: <http://officerslounge.clubs.harvard.edu/article.html?aid=101>

<sup>20</sup> Link, HAA Clubs: <https://alumni.harvard.edu/haa/clubs-sigs/clubs-directory>

<sup>21</sup> Link, HAA SIGs: <https://alumni.harvard.edu/haa/clubs-sigs/sigs-directory>

<sup>22</sup> Link, HAA Clubs: <https://alumni.harvard.edu/haa/clubs-sigs/clubs-directory>

<sup>23</sup> Link, HAA SIGs: <https://alumni.harvard.edu/haa/clubs-sigs/sigs-directory>

<sup>24</sup> Link, Harvard Business Clubs: <https://www.alumni.hbs.edu/clubs/Pages/clubs.aspx>

<sup>25</sup> Link, HKS Regional Alumni Networks: <https://www.hks.harvard.edu/about/alumni/engage/networks/regional-networks>

<sup>26</sup> Link, Harvard Law School Clubs and SIGs: <http://hls.harvard.edu/dept/alumni/harvard-law-school-association/>

<sup>27</sup> Link, HAA Programs and Events: <http://alumni.harvard.edu/programs-events>

<sup>28</sup> Link, Harvard Alumni Online Learning: <http://online-learning.harvard.edu/alumni>

<sup>29</sup> Link, Global Networking Night (GNN): <http://alumni.harvard.edu/haa/clubs-sigs/programs/global-networking-night>

- ⊙ **Host a Harvard professor through the [HAA Speakers Bureau program](#).**<sup>30</sup> Interested in having a Harvard professor deliver a lecture at a location of your choosing? Arrange for your Club/SIG to participate in this HAA program. There are some restrictions, but generally the HAA will cover round trip travel for domestic events. There might be subsidies for extensions to an international trip.
- ⊙ **Bring the [Harvard Prize Books program](#) to your community.**<sup>31</sup> Inspire promising students to place Harvard on their radar screens. Maintain Harvard's presence at the schools in your area. Honor an outstanding student with a book through the Harvard Book Prize program.
- ⊙ **Fund the public service of a current Harvard student through the [Summer Community Service Fellowship Program](#).**<sup>32</sup> Encourage undergraduate Harvard students to dedicate their talents to public service, to serve in your community, and to work with a non-profit host organization active in your area.
- ⊙ **Lead community events to promote the [HAA Early College Awareness](#).**<sup>33</sup> As a Harvard leader, promote college as a goal within schools in your community whose students may not necessarily have college in their sights. Give the students and their families the information they need to follow the process and make the goal of attending college (not just Harvard, but college, period) a reality!
- ⊙ **Bring your members together to watch the [Harvard-Yale Game telecast](#).**<sup>34</sup> How better to connect with Harvard, than to watch the Harvard-Yale Game?! (Perhaps watch The Game with the local Yale Club or your SIG's Yale counterpart!) Consider getting together to watch another Harvard sporting event and be on the lookout for the teams' away games in your area.
- **Keep in Touch with Harvard News.**
  - ⊙ **Subscribe to campus publications** such as the [Harvard Gazette](#),<sup>35</sup> the [Harvard Magazine](#),<sup>36</sup> and [The Harvard Crimson](#).<sup>37</sup> Keep in touch with the activities, issues and developments on campus through (free) daily emails!
  - ⊙ **Subscribe to the e-newsletters of Harvard centers or programs of interest.**
  - ⊙ **HAA Social Media Contact Information**
    - Twitter: [@harvardalumni](#)
    - Instagram: [@harvardalumni](#) [@haapwlovejoy](#)
    - Snapchat: [harvardalumni](#)
    - Facebook Page: [www.facebook.com/harvardalumniassoc](http://www.facebook.com/harvardalumniassoc)
    - Facebook Group: [www.facebook.com/groups/2200089725](http://www.facebook.com/groups/2200089725)
    - LinkedIn: [Harvard Alumni Network](#)<sup>38</sup>
    - HAA Clubs and SIGs: [clubs@harvard.edu](mailto:clubs@harvard.edu)
    - Harvard Key: <https://key.harvard.edu/>

### Satisfying Your HAA Housekeeping Matters

- **Complete your HAA Annual Report.** Every HAA Club/SIG President is required to complete an Annual Report. This is the only task specifically required by the HAA.
  - ⊙ The President and the Board should set aside time to complete the annual evaluation together as a group.
- **Serve as a resource for alumni during the transition to the HarvardKey system.** Make sure you have obtained your HarvardKey and, as a leader, you are prepared to assist other officers and/or Club/SIG members in obtaining theirs. The HarvardKey is designed to ensure a high level of online

<sup>30</sup> Link, HAA Speakers Bureau: <https://alumni.harvard.edu/haa/clubs-sigs/programs/speakers>

<sup>31</sup> Link, Harvard Prize Books: <https://alumni.harvard.edu/haa/clubs-sigs/programs/prize-book>

<sup>32</sup> Link, Summer Community Service Fellowship Program: <http://alumni.harvard.edu/haa/clubs-sigs/programs/scsf>

<sup>33</sup> Link, HAA Early College Awareness: <http://alumni.harvard.edu/haa/clubs-sigs/programs/eca>

<sup>34</sup> Link, Harvard-Yale Game: <https://alumni.harvard.edu/harvard-yale>

<sup>35</sup> Link, Harvard Gazette: <http://news.harvard.edu/gazette/>

<sup>36</sup> Link, Harvard Magazine: <http://harvardmagazine.com/>

<sup>37</sup> Link, The Harvard Crimson: <http://www.thecrimson.com/>

<sup>38</sup> Link, Harvard Alumni Network: <https://www.linkedin.com/edu/harvard-university-18483>

security and to provide you with important protections. For more information, please consult the [Harvard Key FAQs for Alumni](#).

- **Promote HAA Directory updates.** Encourage your Club/SIG members to update their HAA Directory information.

## **APPENDIX**

### **CLUB/SIG CHALLENGES AND RESOLUTIONS**

*This section presents common issues Clubs/SIGs face and recommendations for overcoming them.*

- The level of Board involvement decreases.
  - ⊙ Actively renew the Board. Raise the issues in a transparent and candid way to the Board and brainstorm priority issues and solutions together.
- The Board becomes completely inactive.
  - ⊙ Encourage a proactive and motivated person to reach out to the Board, perhaps starting with an individual Board member, to try to engage in a conversation with the Board. If attempts to work with the Board are unsuccessful and the Board still remains inactive, work to create a new Board and present your recommendations at the Annual Meeting or General Assembly. Contact your HAA Director for Clubs & SIGs and/or the HAA for further guidance.
- The long-serving president, or other Club/SIG officer, is not willing to retire.
  - ⊙ Delegate responsibilities to others gradually.
  - ⊙ Reach out to your HAA Director for Clubs & SIGs and the HAA. They will be able to guide you through the transition.
- The president steps down without a successor or is unable to continue fulfilling his or her responsibilities.
  - ⊙ Convene a Board meeting to appoint a successor.
- You find that an elected Board member is challenging to manage.
  - ⊙ This underscores the importance of nurturing candidates and evaluating their commitment and qualifications before they assume office. Review and, if needed, update Bylaws to include provisions for the removal of officers.
- A Board member repeatedly takes actions without the president's approval.
  - ⊙ Talk to the Board member. If the conduct persists, decide how best to remove the officer from the Board. If possible, wait out the remainder of his/her term. Otherwise, initiate the process to remove according to the Bylaws.
- Board member sends unreasonable messages.
  - ⊙ Start a dialogue with the Board member. If you are unable to reach a resolution, identify a Club/SIG member who has a close relationship with the Board member to intercede or ask a well-respected member of the Club/SIG community to mediate. Also, contact your HAA Director for Clubs & SIGs or the HAA main office in Cambridge.
- There is internal disagreement on a serious matter.
  - ⊙ Try mediation through a third party. If this route is unsuccessful, contact your HAA Regional Director for Clubs & SIGs or the HAA main office in Cambridge for further direction.
- There is continuing disagreement during Board meetings affecting the Board's productivity.
  - ⊙ Address this situation and decide on issues via a majority quorum at Board meetings.
- The Board is comprised of members who lack ideas and/or a positive attitude.
  - ⊙ Follow and, if needed, update the removal provisions in the Bylaws. If you are transitioning the whole Board, consider engaging at least one member of the Board being phased out in the transition for historical knowledge and guidance.
  - ⊙ Use the Organizational Core Competencies Model to strategically recruit volunteers based on the skills, expertise and attributes needed by the Board.

- The Board and the Nominating Committee are unable to come to an agreement on a new president among several candidates.
  - ◎ Have the Board discuss this matter. If the Board is unable to come to a resolution, consider following a consensus process to identify a new candidate.
- How do Clubs/SIGs subsidize the cost involved with the president's responsibilities (travel, hosting one-on-one and/or small meetings, etc.)?
  - ◎ Club/SIG should consider creating a fund dedicated to cover such expenses.

## LEADERSHIP REFERENCE MATERIALS

Consider subscribing to the Harvard Business Review (HBR) newsletter to keep current on new research about nurturing leadership and enhancing team effectiveness. Please note that HBR limits the number of articles that may be read free of charge per month in any given browser.

### Nurturing Leaders

- [How Microsoft Uses a Growth Mindset to Develop Leaders](#),<sup>39</sup> by Carol Dweck and Kathleen Hogan
- [Making Yourself Indispensable](#),<sup>40</sup> by John H. Zenger, Joseph Folkman, and Scott Edinger
- [Managing Yourself: Stop Holding Yourself Back](#),<sup>41</sup> by Anne Morriss, Robin J. Ely, and Frances X. Frei
- [Grooming Next Generation Leaders](#),<sup>42</sup> by Martha Lagace with Professors W. Earl Sasser and Das Narayandas
- [Narcissistic Leaders](#),<sup>43</sup> by Michael Maccoby
- *Strategic Management for Nonprofit Organizations*, by Sharon Oster (Introduction and Why do we have Nonprofits chapters, Pgs. 3-10 and 17-22)

### Leadership Qualifications

- [The Most Important Leadership Competencies, According to Leaders Around the World](#),<sup>44</sup> by Sunnie Giles
- [Managing Your Team](#),<sup>45</sup> by Professor Linda A. Hill
- [What Makes a Leader?](#),<sup>46</sup> by Daniel Goleman
- [Leading by Feel](#),<sup>47</sup> HBR Inside the Mind of a Leader issue, January 2004

### Enhancing Team Effectiveness

- [Leading Teams: 4 Ways to Be More Effective at Execution](#),<sup>48</sup> by Jack Zenger and Joseph Folkman
- [Start with Why](#),<sup>49</sup> by Simon Sinek
- [Strategic Performance Measurement and Management in Nonprofit Organizations](#),<sup>50</sup> by Robert S. Kaplan
- *Good to Great*, by Jim Collins. Chapter 2 "Level 5 Leadership" and Chapter 3 "First Who...Then What"
- [Effective Oversight: A Guide for Nonprofit Directors](#),<sup>51</sup> by Regina Herzlinger

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<sup>39</sup> Link, How Microsoft Uses a Growth Mindset to Develop Leaders: <https://hbr.org/2016/10/how-microsoft-uses-a-growth-mindset-to-develop-leaders>

<sup>40</sup> Link, Making Yourself Indispensable: <https://hbr.org/2011/10/making-yourself-indispensable>

<sup>41</sup> Link, Managing Yourself: Stop Holding Yourself Back, [https://hbr.org/2011/01/managing-yourself-stop-holding-yourself-back&ab=Article-Links-End\\_of\\_Page\\_Recirculation](https://hbr.org/2011/01/managing-yourself-stop-holding-yourself-back&ab=Article-Links-End_of_Page_Recirculation)

<sup>42</sup> Link, Grooming Next Generation Leaders: <http://hbswk.hbs.edu/item/grooming-next-generation-leaders>

<sup>43</sup> Link, Narcissistic Leaders: <https://hbr.org/2004/01/narcissistic-leaders-the-incredible-pros-the-inevitable-cons>

<sup>44</sup> Link, The Most Important Leadership Competencies, According to Leaders Around the World: <https://hbr.org/2016/03/the-most-important-leadership-competencies-according-to-leaders-around-the-world>

<sup>45</sup> Link, Managing Your Team: <https://hbr.org/product/Managing-Your-Team/an/494081-PDF-ENG>

<sup>46</sup> Link, What Makes a Leader?: <https://hbr.org/2004/01/what-makes-a-leader>

<sup>47</sup> Link, Leading by Feel: <https://hbr.org/2004/01/leading-by-feel>

<sup>48</sup> Link, Leading teams: 4 Ways to Be More Effective at Execution: <https://hbr.org/2016/05/4-ways-to-be-more-effective-at-execution>

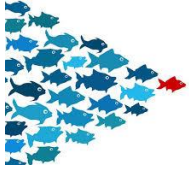
<sup>49</sup> Link, Start with why: <https://www.startwithwhy.com/>

<sup>50</sup> Link, Strategic Performance Measurement and Management in Nonprofit Organizations: <http://onlinelibrary.wiley.com.ezp-prod1.hul.harvard.edu/doi/10.1002/nml.11308/epdf>

<sup>51</sup> Link, Effective Oversight: A Guide for Nonprofit Directors: <https://hbr.org/1994/07/effective-oversight-a-guide-for-nonprofit-directors>

## TED Talks: Leadership

### Playlist: How to be a great leader (12 talks)



What makes a great leader? These TED Talks offer surprising, nuanced approaches on how to inspire and empower others to do their very best.

12 talks · Curated by TED

[https://www.ted.com/playlists/140/how\\_leaders\\_inspire](https://www.ted.com/playlists/140/how_leaders_inspire)

### Linda Hill: How to manage for collective creativity



What's the secret to unlocking the creativity hidden inside your daily work, and giving every great idea a chance? Harvard professor Linda Hill, co-author of "Collective Genius," has studied some of the world's most creative companies to come up with a set of tools and tactics to keep great ideas flowing — from everyone in the company, not just the designated "creatives."

[https://www.ted.com/talks/linda\\_hill\\_how\\_to\\_manage\\_for\\_collective\\_creativity?language=en](https://www.ted.com/talks/linda_hill_how_to_manage_for_collective_creativity?language=en)

### Roselinde Torres: What it takes to be a great leader



The world is full of leadership programs, but the best way to learn how to lead might be right under your nose. In this clear, candid talk, Roselinde Torres describes 25 years observing truly great leaders at work, and shares the three simple but crucial questions would-be company chiefs need to ask to thrive in the future.

[https://www.ted.com/talks/roselinde\\_torres\\_what\\_it\\_takes\\_to\\_be\\_a\\_great\\_leader?language=en](https://www.ted.com/talks/roselinde_torres_what_it_takes_to_be_a_great_leader?language=en)

### Adam Grant: Are you a giver or a taker?



In every workplace, there are three basic kinds of people: givers, takers and matchers. Organizational psychologist Adam Grant breaks down these personalities and offers simple strategies to promote a culture of generosity and keep self-serving employees from taking more than their share.

[https://www.ted.com/talks/adam\\_grant\\_are\\_you\\_a\\_giver\\_or\\_a\\_taker?language=en](https://www.ted.com/talks/adam_grant_are_you_a_giver_or_a_taker?language=en)

## BEST PRACTICES

### Leadership Identification

- o Being engaged with Club/SIG activities with a pattern of taking initiative is an important indicator of leadership potential.
- o Ideal skills and personal qualities include friendliness, enthusiasm, curiosity, and integrity; desirable skills include being a good listener, a good team player, and managing activities in a well-organized manner.

### Succession Planning

- o The Board should first review the activities the Club/SIG wants to promote as well as the challenges it has recently faced before beginning leadership succession planning.
- o A process should be established for Officers and/or Board members to recommend candidates for president.
- o A Board structure in which a vice president rises to president provides the dual opportunity for the rising president to become familiar with the role and for the seated president to have the backup of the officer slated to become president.

### Ongoing Leadership Development

- o Become familiar with and utilize HAA resources.
- o Make an effort to attend the annual Alumni Leadership Conference (ALC) held in February.
- o Discuss questions and explore planning ideas with the HAA Director for Clubs/SIGs assigned to your area.

### Leadership Transition

- o A period of overlap of the newly elected president and the former president is ideal.
- o An onboarding program should be developed to ensure the new president has an opportunity to gain the information, skills, and behaviors required to be successful.
- o Develop and maintain a *RunBook*: an extensive resource document that contains all key information, including names, contact information, event descriptions, and lessons learned, for all Club/SIG activities.

If you have questions or comments, please contact [clubs@harvard.edu](mailto:clubs@harvard.edu), 1.800.654.6494 or 617.495.3070.