Overview of Presentation:

- Define officer roles
- Long-term/Short-term Planning
- Goal Setting
- Expectations for Board
- Delegation & Communication Strategies
- Board Recognition & Retention
- Succession Planning
- Volunteer Recruitment
- Generating Interest & Evaluating Efforts
- Q & A
Constitutional Definitions of Roles

• **President**: The president shall preside at all meetings of the Club/Society, shall serve as the chairperson of the Board of Governors of the Club/Society and an ex officio member of all committees, shall become familiar with alumni club resources and shall attend or assign designee to necessary training workshops.

• **Vice President/President-Elect**: The vice president or president-elect shall assist the president. In the absence or disability of the president, or at his or her request, the vice president or president-elect shall perform the duties of the president. If the office of president becomes vacant, he or she shall become president for the unexpired term.
<table>
<thead>
<tr>
<th>President</th>
<th>Vice President/President-Elect</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Supervises all alumni group affairs and provides leadership/vision for alumni group.</td>
<td>• Perform duties of the President in his or her absence (vacation, departure from position, etc.)</td>
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<tr>
<td>• Establish short and long-term goals.</td>
<td>• Coordinate with the President on responsibilities with short-term, long-term goals (the “how”).</td>
</tr>
<tr>
<td>• Organize and run board meetings</td>
<td>• Follow-up with board officers on tasks, deadlines, and goals (for example, have committee chairs report to VP instead of Pres).</td>
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<tr>
<td>• Serve as liaison between the alumni group and OSUAA.</td>
<td>• Build rapport with board officers and relationships with group members.</td>
</tr>
<tr>
<td>• Delegate responsibilities and tasks to board officers, build rapport, and resolve conflicts.</td>
<td>• Fills in when needed for BOG responsibilities (if you don’t have an events committee, VP can coordinate events, for example).</td>
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<tr>
<td>• Preside at group events, represent the alumni group and the university professionally and enthusiastically.</td>
<td>• Might drive fundraising strategy</td>
</tr>
<tr>
<td>• Keep alumni group on track for its goals.</td>
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<tr>
<td>• Build relationships with alumni group community, local businesses (when applicable), and with university staff.</td>
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</tbody>
</table>
What are we missing from this list?
Setting Expectations

- Annually created, and revisited
- Specific, defined (no ambiguity)
- Memorable
- Known
- Folks should be held accountable to them
- Relevant to your group
- Set the Tone
- Plan Retreat or Planning Meeting
- Energize board
- Secure Buy-In

**Short-Term Goals**
- Events
- Football Season
- Fundraising

**Long-Term Goals**
- Event Calendar for Year
- Membership Growth
- Succession Planning
S.M.A.R.T. Goals

Specific (simple, sensible, significant).
Measurable (meaningful, motivational).
Achievable (agreed, attainable).
Relevant (reasonable, realistic and resourced).
Time bound (time-based, time limited, time/cost limited).

Examples:
- Increase membership to 250 by Oct. 31st, utilizing game day events, post card, and email blasts to accomplish this task.
- Set dates for three Category I events by December meeting.
## Sample Calendar of Events for The Ohio State Alumni Association Clubs

The Ohio State University Alumni Clubs serve to advance the mission and values of the Alumni Association and the University. Clubs can achieve different levels of engagement which will reflect the Alumni Association’s fiscal support. Below you will find a sample calendar clubs can use to plan and participate in events, fundraising, and meetings.

<table>
<thead>
<tr>
<th>Month</th>
<th>Scarlet ($2000 at end of fiscal year)</th>
<th>Gray ($1000 at end of fiscal year)</th>
<th>Carmen</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>Board Meeting</td>
<td>Board Meeting</td>
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<tr>
<td></td>
<td>Championship Game Watch</td>
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<tr>
<td>February</td>
<td>Scholarship Committee Review</td>
<td>Scholarship Committee Review</td>
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<tr>
<td>March</td>
<td>Game Watch (Basketball)</td>
<td>Game Watch (Basketball)</td>
<td>Game Watch</td>
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<tr>
<td>April</td>
<td>Board Meeting</td>
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<td></td>
<td>5K Race Event (up to $250)</td>
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<tr>
<td>May</td>
<td>Guest Speaker Event &amp; Dinner (up to $250)</td>
<td>Guest Speaker Event &amp; Dinner (up to $250)</td>
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<tr>
<td>June</td>
<td>Annual General Body Meeting &amp; Social</td>
<td>Annual General Body Meeting &amp; Social</td>
<td>Annual General Body Meeting</td>
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<tr>
<td>July</td>
<td>Buckeyes After Work (up to $500)</td>
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<tr>
<td>August</td>
<td>Board Meeting</td>
<td>Student Send-Off (up to $250)</td>
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<tr>
<td></td>
<td>Student Send-Off (up to $250)</td>
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<tr>
<td>September</td>
<td>Attend Club &amp; Society Leadership Symposium</td>
<td>Board Meeting</td>
<td>Attend Club &amp; Society Leadership Symposium</td>
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<td>October</td>
<td>Board Meeting</td>
<td>Game Watches</td>
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<td></td>
<td>Game Watches (Football)</td>
<td>Game Watches</td>
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<tr>
<td>November</td>
<td>Game Watches</td>
<td>Game Watches</td>
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<td></td>
<td></td>
<td>Game Watch</td>
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<tr>
<td>December</td>
<td>Board Meeting</td>
<td>Holiday Party</td>
<td>Volunteer at Local Soup Kitchen (up to $250)</td>
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<td></td>
<td>Volunteer at Local Soup Kitchen (up to $250)</td>
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<tr>
<td></td>
<td>Holiday Party</td>
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<tr>
<td>Month</td>
<td>Scarlet ($2000 at end of fiscal year)</td>
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<td>Carmen</td>
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<tr>
<td>January</td>
<td>Board Meeting &amp; OSU Men's Basketball Tailgate and Game</td>
<td>Board Meeting (up to $50)</td>
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<tr>
<td>February</td>
<td>Buckeye Love Annual Fundraising E-Mail Campaign (up to $250)</td>
<td>Buckeyes &amp; Broadway (up to $250)</td>
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<tr>
<td>March</td>
<td>Wine Tasting Scholarship Fundraiser (up to $250)</td>
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<td>April</td>
<td>Board Meeting</td>
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<td></td>
<td>Graduating Senior Reception (up to $250)</td>
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<tr>
<td>May</td>
<td>Guest Speaker Event &amp; Dinner (up to $250)</td>
<td>Guest Speaker Event &amp; Dinner (up to $250)</td>
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<tr>
<td>June</td>
<td>Family Picnic Event at the Columbus Zoo</td>
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<tr>
<td>July</td>
<td>Buckeyes After Work Young Alumni Networking (up to $500)</td>
<td>Board Meeting (up to $50)</td>
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<tr>
<td>August</td>
<td>Board Meeting (up to $50)</td>
<td>FYE Book Club Program (up to $250)</td>
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<tr>
<td>September</td>
<td>Attend Club &amp; Society Leadership Symposium</td>
<td>Attend Club &amp; Society Leadership Symposium</td>
<td>Attend Club &amp; Society Leadership Symposium</td>
</tr>
<tr>
<td>October</td>
<td>Homecoming Tailgate &amp; Annual Membership Meeting</td>
<td>Homecoming Tailgate &amp; Annual Membership Meeting</td>
<td>Board Meeting</td>
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<tr>
<td>November</td>
<td>Buckeyes &amp; Broadway (up to $250)</td>
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<tr>
<td>December</td>
<td>Board Meeting</td>
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<td></td>
<td>Holiday Party</td>
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</tbody>
</table>
Social Events

**Oktoberfest**  
*Thursday, October 20, 2016*  
*Moorings Park Beach*

**Welcome Back Buckeyes Cocktail Party**  
*Thursday, November 10, 2016*  
*Wells Fargo Private Bank at Mercato*

**Buckeyes Care Luncheon & Fashion Show**  
*Wednesday, November 16, 2016*  
*Hilton Naples*

**Double Sunshine Christmas Boat Parade**  
*Saturday, December 10, 2016*  
*Tin City Dock*

**Buckeyes “Grow the Fund” Party**  
*Thursday, January 19, 2017*  
*Huntington Private Client Group at Pelican Bay*

**Italian Casino Night**  
*Thursday, February 23, 2017*  
*Artichoke & Company*

**St. Patrick’s Day Parade**  
*Saturday, March 11, 2017*  
*5th Avenue, Downtown Naples*

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**A Buckeye Evening**  
*Thursday, March 16, 2017*  
*Ed & Jenna Gonzalez’ Home*

**Golf Tournament**  
*Monday, May 1, 2017*  
*Country Club of Naples*

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**Happy Hours**  
*Thursday, September 15, 2016*  
*Inn at Pelican Bay*  
*Thursday, April 20, 2017*  
*Paradise Wine*  
*Thursday, May 18, 2017*  
*Bellasera Hotel*

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**Meet and Greet**  
**Buck-I-Serv Students**  
*Monday, December 19, 2016*  
*Monday, March 13, 2017*  
*Monday, May 8, 2017*  
*Stevie Tomato’s Sports Page*

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For More Information visit  
www.NaplesBuckeyes.com or contact  
Sara Ann Mousa at 239-593-9196

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11
Strategies for Delegation

• Learn to Let Go
• Play to your volunteer strengths
• Always Include Instructions
• Don’t be afraid to teach new skills
• Trust, but verify
• Use Feedback Loops to improve Delegation
Strategies for Communication

- Define what works well for the group
- Tech vs. No Tech
- Set expectations
- Follow Up

Utilize Technology!
Free Online Project Management Sites, like Trello.com

https://www.youtube.com/watch?v=ph5UVsuqPUU
Best Practices

Board Recognition & Retention

● Big Thanks and Little Thanks
  ○ $50 reimbursement

● Check-ins

● Empowering Decision Making and Autonomy

● Balancing Workloads

● Making it fun!
  ○ Acknowledging Life outside of board
Succession Planning

- Starts before you decide to leave
  - Identifying skilled volunteers/actively engaged members
  - Mentoring them into role
- Using an “elect” system
  - VP or Pres-Elect?
- Stagger terms of certain positions so that it’s not a complete board turnover
- Transition plan should be in place and well known
- Creating transition documents during term
Best Practices

Generating Interest & Evaluating Efforts

- See who is already coming out to your events and game day watches and ask them what they are looking for
- Utilize an OSUAA survey that we can send out to all alumni in the area, for example: https://osu.az1.qualtrics.com/jfe/form/SV_bDA2wKELM4U8GeF
- Marketing through Regional Communication Services (e-mail, print & website)
- Social Media/LinkedIn/Alumni Fire
- Young Alumni events
Volunteer Recruitment

Surveys

To help us understand what potential Austin Alumni Club activities you would be interested in attending, please select all that apply:

- Buckeye Game Day events
- Community service
- Professional development
- Socializing opportunities
- Arts and culture events
- Recruitment and/or interactions
- Educational and learning opportunities
- Cultural tours
- Entertainment, attractions and festivals

We are looking for alumni volunteers in the Austin area interested in serving as club leaders, specifically the Scholarship Chair. Are you interested in learning more about how you can volunteer in this way?

Yes, please send me more information (please include your first and last names, and your e-mail address below):

Not at this time
LinkedIn

- “Find Alumni” Tool allows you to search for alumni by geographical area, industry, graduation date, and other criteria.
- You can “connect” with other alumni and share messages.
- You can create an alumni group on LinkedIn and direct alumni to do this
  linkedin.com
- Ohio State student/alumni mentoring network
- osu.alumnifire.com
● “Seven Steps to Running the Most Effective Meeting Possible”
● “How to design an agenda for an effective meeting.”
● “SMART Goal Examples”
● “How to run a powerful, purposeful board retreat.”
What We’ve Covered
Q & A
Leslie Shoaf
shoaf.45@osu.edu
614-247-8022

Brendan Braaten
braaten.8@osu.edu
614-247-8068