August 2013 Quarterly Call Notes

Overview:

Donna MacPhee shared that over the summer the CAA continued to plan for the upcoming academic year. The CAA continues to focus on content creation to maximize the intellectual programming offered to alumni. New programs will enhance the value of visiting professors with current research projects as well as university initiatives and priorities.

The class of 2017 arrived on campus the week of August 18th with move-in on Sunday and convocation on Monday. The CAA is already working on educating the new students on engagement opportunities with alumni.

Alumni leaders are encouraged to attend the World Writers Festival, Festival des Écrivains du Monde September 20-22, 2013. The festival will be at the Columbia Global Centers | Europe in Paris, France. The CAA will be holding a leaders conference for alumni Saturday as well as a public reception that night.

Alumni leaders are also invited to come back to campus this fall for our annual leaders weekend which will occur during trustees weekend October 11-12. Over 400 alumni leaders will participate in the weekend and the ten Alumni Medalists will be recognized at the Saturday evening gala in Low Library. Friday night will be a panel and reception at Jazz at Lincoln Center. Regional leaders will have the opportunity to attend sessions on the new NationBuilder platform and succession planning for their clubs. Based on your club’s categorization level, attendees can request travel stipends to attend and we are open to having as many leaders attend as possible. View the schedule here.

Our new web-based community building platform, NationBuilder, will be rolled out to a small group of alumni clubs in early September for a pilot phase. After successful testing, the platform will be rolled out to all clubs over the next six months. The benefits of this new web based community tool include the ability to cultivate and communicate with alumni in your catchment area without having to keep separate lists, accept payment, and link to social media. You will also be able to track alumni participation. You can manage members while accessing their contact information and send messages to them directly. We are looking for alumni feedback so we can continue to grow and modify the platform to our alumni needs.

Nominations for the regional club award are now being accepted. This is the second year for the award but the first year for clubs to self-nominate. Be sure to submit your club for the award to highlight the engagement of alumni in your area as well as share how Columbia has connected with your community. Alumni leader peers will choose this year’s winner.

Connie Kopec encouraged clubs to participate in Columbia Connects (formerly World Wide Networking) if they had not already committed to do so. Columbia Connects will take place on September 26 this year, and clubs will host events on or near that date. This annual signature event allows alumni to connect with one another while welcoming new alumni in the area. This year, over 60 clubs will be participating. We encourage clubs to interact with each other on the day of your event via social media #ColumbiaConnects.

Giving Day will be October 23. We encourage you to spread the word to club members. Resources to be shared soon and can be distributed at all Columbia Connects events.
Save the date:


Columbia Connects, September 26

New York City Alumni Leaders weekend, October 11 – 12

Giving Day, October 23

Resources:

Alumni Leader Toolkit  Online Resources
CAA 2017
Facebook
LinkedIn
Alumni Directory

Agenda Topics for Discussion:

1. Leadership/Pipeline development - how do you engage new alums, encourage them to get involved, and train them to become leaders? If your club does not have elections, what is your process for placing people on the board and/or giving people responsibility within the organization?
2. How does your group manage the budget process – best practices vs. current realities?

*Please note, the second North America (west coast) call was cancelled.
Quarterly Call Notes  
August 20th, 2013  
7:30 am

Call coverage: Asia/Pacific/India

Attendees:
Bangladesh: Afree Syed ’04SEAS
Nepal: Gandha Pandit ’91LAW

Columbia Alumni Association:
Donna MacPhee ’89CC, P: ’18CC, Vice President for Alumni Relations & President
Louise Rosen ’99JRN, Deputy VP, Alumni Relations
Connie Kopec, Senior Director, Alumni Relations, Regional and Shared Interest Groups
Jaclyn Chu ’02CC, Associate Director, International Alumni Relations
Brianna Clementz, Coordinator, Alumni Relations

Regional updates included:
Jacyln Chu shared the highlights of the recent Leaders Weekend in Hong Kong. Attendees enjoyed learning and meeting the other leaders.

Jaclyn encouraged alumni leaders to visit the new Alumni Leader Toolkit and to provide feedback on the resources included.

Open Discussion:
Gandhi is looking to connect with other alumni when he is traveling.

Arefeen asked how to avoid having too many clubs in one region (CAA vs. school-based). He also questioned what was the formal way to establish a new club? The leaders shared that they have committees which plan co-events for specific school to assist with specific programming for the larger university-wide alumni club.

CAA established a new club after momentum is ensured in the area and that a core group of alumni volunteers are committed to leading the effort and attendance is consistent during the first few events. For new regions, the CAA can send an introductory email announcing new activity which includes a participation and interest survey.
Quarterly Call Notes
August 21th, 2013
9:30 am

Call coverage: North America

Attendees:

Palm Beaches: Lindy Gallagher ’82BUS
Southwest Florida: Kristi Kennedy
Tampa: Ingrid Shawn Rodriguez ’02SEAS
Atlanta: Roxann Smithers ’99CC, ’02LAW
Detroit: Louise Giles ’66JRN, Ocie Irons ’84BUS
Ohio: Kevin O’Neal ’85SIPA
Pennsylvania: John Connell ’76CC, P:’13CC, ’16CC, Ruth Craxton
Houston: George Worthington ’78SIPA, ’93BUS
Austin: Madonna Ramp ’12TC

Columbia Alumni Association:

Donna MacPhee ’89CC, P: ’18CC, Vice President for Alumni Relations & President
Louise Rosen ’99JRN, Deputy VP, Alumni Relations
Connie Kopec, Senior Director, Alumni Relations, Regional and Shared Interest Groups
Michaela Shank ’07PH, Sr. Associate Director, Alumni Relations
Jessi Mygatt, Assistant Director, Alumni Relations
Brianna Clementz, Coordinator, Alumni Relations

Regional updates included:

Michaela encouraged clubs to participate in the seventh year of Columbia Connects (formerly World Wide Networking). Jessie shared that NNJ will be having a breakfast for their Columbia Connects event.

Open Discussion:

George questioned what the theme for the Columbia Connects event should be. Connie encouraged him to keep it simple with the focus of meeting other alumni.

George also asked what the criteria was for testing the new platform during the pilot phase. Louise Rosen indicated that based on staff SWOTs of clubs as well as ensuring a diverse community was represented determined initial club participation. Liaisons will send a schedule of anticipated rollout for pilot phase within the next month.

Madonna shared her satisfaction with CAA support and online resources.

Lindy expressed she looks forward to using the new platform as Meetup, what the club has used, has had privacy issues.

Open discussion on leadership/pipeline development:

Roxann shared that the club opens a monthly board meeting for all club members to assist in identifying those that may be interested in getting involved. The club created new bylaws that include annual elections. She prefers to engage alumni that show their commitment to the club.
John indicated that they have a bylaws committee to formalize the guidelines of the club. They are currently looking at the tax status of the club to provide more structure.

Lindy is looking to grow her board. Previously, it was not heavily structured. They rewrote their bylaws and are in the process of becoming incorporated to 507C. They currently have four board positions and are looking to add new people/roles with specific skills.

George identifies people who have previously held successful programming. They have “PIGS” (professional interest groups) as well as a geographic group across the city. They elect officers annually but have experienced some challenges with succession planning, although a new process is in place for a president-elect. A new president takes over in November.

Louise questioned how clubs bring in diverse people and offer different programming. She shared that they held several different events around Michigan which were well received. Lindy responded that they bring people together socially and identify attractive programs while coordinating with other school clubs. Ruth indicated that they coordinate with the business school. They focus on different events for different people. The key is that you don’t have to identify everyone at each event.

Madonna manages her members with her listserv. They recently sent a survey to gauge interest and received 70 responses. They then created a calendar based on the survey results. Then they opened a board meeting for everyone to assist with event planning.

CAA encouraged everyone to visit the toolkit for event planning resources as well as the templates to download like nametags and work plans.

**Open discussion on the budget process:**

Roxann shared that the Atlanta group is incorporated and received funding from dues or margins from events. Dues are $25 at the start of the year and increase throughout. Their treasurer provides an overview each month but they have no formal annual budget to anticipate charges. She asked how formal other clubs are in this process especially when working with a smaller budget.

Lindy said their bylaws do not address the budget. She said dues are not required but the bylaws do indicate that they can be two-tiered and structure their fees by members vs. nonmembers.

Ruth shared it will be their first year with dues again. Recent alumni do not have to pay dues. They have a real range of people who pay dues and are involved.

John has 4,000 alumni in his region. Dues do not incentivize them in event participation. Interest goes back to the event itself and then cushion the ticket price.

Roxann suggested that the conversation should continue on the Linkedin subgroup (link is listed at the top of these minutes).
Quarterly Call Notes
August 28th, 2013
8:00 pm

Call coverage: Asia/Pacific

Attendees:
Melbourne: Lisa Tong ’07SEAS
Hong Kong: Helen Chen ’87BC, ’88SIPA
Seoul: Henry Woo ’03SIPA

Columbia Alumni Association:

Donna MacPhee ’89CC, P: ’18CC, Vice President for Alumni Relations & President
Louise Rosen ’99JRN, Deputy VP, Alumni Relations
Connie Kopec, Senior Director, Alumni Relations, Regional and Shared Interest Groups
Jaclyn Chu ’02CC, Associate Director, International Alumni Relations
Brianna Clementz, Coordinator, Alumni Relations

Regional updates included:

Jaclyn Chu shared the highlights of the recent Leaders Weekend in Hong Kong. Attendees enjoyed learning and meeting the other leaders.

Jaclyn encouraged alumni leaders to visit new alumni toolkit and to provide feedback on the resources included.

Congratulations to Hong Kong for winning the song competition at the Ivy Ball this year. Columbia University had the largest representation. (Check out the video here).

There is a new club in Malaysia which will co-market events with Singapore.

Open Discussion:

With NationBuilder, club leaders will be able to assign roles to board/committee members to also have access to the tool.

Are there privacy issues with NationBuilder? CAA is working with general counsel to review specific country issues. If club leaders have any insight that they can provide, please let Jaclyn know.

Open discussion on leadership/pipeline development:

Hong Kong invites alumni to their monthly meetings and assigns tasks. If the alumnus/a is reliable, they can join the committee after several months of participation.

Henry said they have sub groups which all report to the president. The groups meet every quarter to decide who organizes the events. They hold a general meeting where the president is elected. The club hosts 8 – 10 events per year. Members are charged a fee.

Hong Kong and Seoul charge a larger membership fee to board members.

Seoul uses their budget to cover events and members are charged fees to attend.
Quarterly Call Notes
August 28th, 2013
10:30 am

Call coverage: Europe, Middle East, Africa, South/Central America

Attendees:

Brazil: Molly Multedo ’92JRN, ’92SIPA, P: CC’16, Fernando Multedo ’97TC, P: CC’16
Greece: Maria Karageorgou ’96, ’99GSAPP
Basel: Phillippe Waelle ’99GSAPP
Nigeria: Mona Opubor ’95CC
Egypt: Sayed Eid ’87GSAS, ’90SEAS
Israel: Ofer Wainberg ’94SEAS

Columbia Alumni Association:

Donna MacPhee ’89CC, P: ’18CC, Vice President for Alumni Relations & President
Connie Kopec, Senior Director, Alumni Relations, Regional and Shared Interest Groups
Jennifer Freely ’11SCE, Associate Director, International Alumni Relations
Brianna Clementz, Coordinator, Alumni Relations

Regional updates included:

Everyone is encouraged to attend the World Writers Festival in Paris September 20-22.

The President will be traveling to Istanbul in September. There will be a CAA reception on September 24.

Jennifer encourages club leaders to get to know alumni in their area to grow professional contacts as well as build the pipeline of leadership in the area.

Open Discussion:

For the regional award, Molly suggested more publicity for the winners. This year the CAA will promote winner(s) more on Facebook, the web, and possibly the magazine. For future awards, it was also suggested to award a specific activity or program as opposed to the entire club. Also, adding a new category for awarding for new clubs or clubs less than five years.

For NationBuilder rollout, Molly would like to see the dates for rollout for all clubs and Connie let her know we are working on a master schedule which we will roll out to the clubs. CAA is working with general counsel to review specific country issues.

Discussion took place around whether two mailing lists were still needed since some alumni information is still not updated in the database or directory. The CAA encourages leaders to promote use of new tool due to data integration which will solve the issue on improper information.