Donna MacPhee ’89CC, Vice-President for Alumni Relations, CAA President: Welcome
- End of 2013 came with lots of great plans for 2014
  - Updates to CAA board and bylaws and approved 5-year “Big Tent” plan
    o Bylaws: [http://alumni.columbia.edu/CAAByLaws](http://alumni.columbia.edu/CAAByLaws)
    o Alumni Leaders Toolkit: [http://alumni.columbia.edu/toolkit](http://alumni.columbia.edu/toolkit)
    o We are in year one of this plan – first time that the CAA has had a 5-year plan
- First retreat for CAA board will be held February 7-8, 2014
  o Retreat will focus on volunteer partnership and development.
  o There will be training for staff and volunteers on how to be effective ambassadors for Columbia University.
  o Retreat will help to build the picture of creating a volunteer lifecycle.

Jennifer Freely ’11SCE, Associate Director for International Alumni Relations, and Brianna Clementz, Assistant Director for Domestic Alumni Relations: Regional Highlights

International:
- Africa has two new alumni groups in formation
- Europe – Lisbon and Rome are re-forming their alumni groups
- Brazil is expanding into various chapters
- Mexico is forming a club
- Middle East has growth in Doha, UAE, and Lebanon
- India trip in the spring – events in various cities
- Asia trip in June will visit six cities – Seoul, Beijing, Shanghai, Taipei, Hong Kong, and Bangkok.
  Dates are June 19-July 3, and event details will be coming soon.

Domestic:
- Career fair on March 7 on campus – Email Brianna Clementz if your company would be interested in sponsoring a table at the fair.
- Rhode Island had club launch on February 1; it is a partnership with Boston club.
- VA and Vancouver have new club interest.
- DC Club held their annual Hamilton dinner with guest speaker Professor Richard Clarida from Columbia.
- Long Island is establishing a mentorship program – 40 attendees at recent event, 20 mentorship pairs.
- Boston basketball event will be March 1 - [http://boston.alumni.columbia.edu/columbia_at_harvard_basketball_2014](http://boston.alumni.columbia.edu/columbia_at_harvard_basketball_2014)
- The Columbia Club of Minnesota attended the Yale Ivy Leadership Forum, January 30-31, 2014. The club also hosted a happy hour with TCAN (Twin Cities Alumni Network). The initiative was create several years ago to increase networking opportunities for alumni in the area.
- SEAS has a career fair on February 15
- Houston has a wine event on February 27.
- Boston distillery tour on February 5.
- Miami Chinese New Year; Philharmonic event February 28; Spamalot event March 8
- Naples has a professor event with Prof. Farah Griffin on March 21; Ivy League Picnic in April.
- Pittsburgh has just had 2nd meeting and is looking for venues for their first event.
- Philly just had their annual Dim Sum brunch and an upcoming basketball event, aiming to have a full schedule (including CCO in April).
- Atlanta has a month of arts events: Book of Mormon musical event, book club, playgroup at Children’s Ballet (available to families with small children, occurring 3-4 times/year), Professor O’Meally event at the Carlos Museum, ARC interviews.
- Palm Beaches signature event and annual meeting combined to be at the Polo Club, brunch and game on February 9, 75+ registered.
- Michigan will host an alumni panel “Columbia Grads making a difference in Detroit,” walking tour of Detroit, and lecture with Katie Frieze this spring.
- London has recently held faire event, Lunar New Year event, Christmas / Holiday party. Their upcoming events include a private tour of Tate Modern, a tour of Lord’s Cricket Grounds, and a Professor event with Jeremy Dauber
- Paris will have an opera event (tickets available as a membership bonus), art deco event, drinks with Oxford and Cambridge, joint event (picnic) in the spring.

Louise Rosen ’99JRN, Deputy Vice-President for Alumni Relations: Programming and planning for FY’15

- Peer-to-peer training
  - Incorporated clubs assist those who are looking to become incorporated, walk them through the process.
  - Expanding social media – those with large social media presence talk about how they built their web presence.

Discussion on Branded Marketing Materials and other Club Requests:
- Banners will be ordered mid-Spring
- Other giveaway/marketing items requested by the clubs:
  - Ball caps and t-shirts are good for athletic events
  - License plate frames
  - Car magnets
  - Business card holder
  - Calendars (formatted with CAA signature events and events on campus)
  - Steady supply of nametag stickers
  - Pens
  - Lapel pins
  - Luggage tags
  - Moleskines
- Flashdrives
- Bookmarks
- Shopping bags
- Footballs
- Padfolio
- Atlanta usually sends out marketing items with their membership drive
  - 150-200 paid members pay $25/$30 depending on when they renew membership
  - Budget $500-$1,200 for mailed incentives

**Upcoming CAA Regional and Signature Events:**
- CCO event is on April 5th
- Columbia Connects in September
- Columbia Alumni Leaders weekend in NYC is October 10-11 – good way to continue connection with fellow alumni leaders

**Leader Discussion, Based around Questions Submitted by Karl Metzner, President, Columbia Alumni Association of Beijing:**
- How many people should be involved in "running" a club?
- How are volunteers rewarded and motivated?
- What are the signs of a weak club and a strong club?
- Does assigning positions work?
- Should leaders have term limits?

- Eric Gebaide in Long Island (egebaide@innovationadvisors.com) – How do we form committees under board members?
  - Palm Beaches club has Young Alumni Liaison, tech committee, events management
  - Michigan did regional activities in downtown Detroit and Ann Arbor to recruit volunteers
    - Designated "Columbia Leads" for each event
- Theresa in Houston (tquintanilla84@gsb.columbia.edu) – all officers in Houston do succession planning, 1:1 networking, help to get others involved. They follow up with volunteers monthly (board of 12 people), but leaders don’t have specific term limits.
- Steve Kane in Boston (skane@richmaylaw.com) has a 12 people board, but 4-5 of them do the bulk of the work. He assigns positions and delegates to those whom he trusts to do the work. No term limits, but agreement with the board as to succession planning. The board volunteers their time for their love of Columbia; a simple thank you is good recognition.
- Lee-En in Sarasota, FL (ladychung@yahoo.com) – thank you to board members (and non-alums) every year – umbrella.
- Ellen in Michigan (esp22@caa.columbia.edu) – involving young alumni in Ann Arbor. Empower someone to ‘owning’ an event. They do many free events, but they’ve found that charging a small event fee will help get people to events, along with swag/giveaways.
- Tatin in Germany (orauch02@gsb.columbia.edu) – board of 6 (2 from Business School, plus another B-school club leader), emailing between groups and no school-specific events.
- Co-promoting events across schools
- Richard Ryder in Naples, FL (rkyder75@gmail.com) – active recruitment of new move-ins; they have a lot of Physicians and Surgeons alumni.
- Karl in Beijing (metzner.karl@gmail.com) – how do you motivate people to gather in a leadership group, and how do you keep the leaders motivated once they've established that group? How are people selected to be a part of a leadership group, and how long do they stay in that position? Are there elections, who is eligible, and how long should each person serve?
- Ruth in Philadelphia (rcraxton@aol.com) – Philadelphia is undergoing a “resurrection,” now has people who are interested in volunteering – started out casual and then established a more formal structure after they had shown their commitment. Board of 5 people formalized after those roles were established in the bylaws. Make everyone feel welcome to every event. Network during those events. The same people have led for the past 2-3 years and it will continue through 2014. Recruiting successors will be something they are looking at this year.
- Robert Mo in Rhode Island (robert.h.mo@gmail.com) – engagement is really important. Allowing all participants to feel like a part of the group. Alumni leave with a connection that will help grow their alumni community. Offer a variety of options for all guests.
- Beijing – mixers, speakers, collaborations with London School of Economics and Shanghai School of Business, golf day, Holiday party, Chinese New Year event.
- Collaborations with other schools: liaison with Business School alumni community, partner with Harvard Club in Princeton, relationships with the Columbia Global Centers (not promoted through the club, though, unless they're involved in their event specifically), developing events with Business School, working closely with other Ivy's who are in the process of establishing themselves and collaborating for joint events.
- For newer clubs – just thinking of activities and events in a variety of settings and get alumni traction from those in attendance.
- Contacting other Ivy clubs – just look them up and give them a call.
- Jim in Pittsburgh (jlewells@flipsidemedia.com) – are all “first” events a happy hour?
  o Other event ideas are family-hosted, brunch, looking for ‘interesting’ individuals in the community, merge with professional networking component.
- Louise in Michigan (louiseagiles@gmail.com) – leaders in Michigan start mentoring their successors.
- Dawn in London (dawn.brindle@btinternet.com) – refreshing the board, connect with alumni who are new to London, establish steering committees, creating roles that need people to fill them, SIPA community in London with untapped volunteers, formalized or structured job roles that they could publicize to others.
- Margo in Paris (margo.cointreau@gmail.com) – have to be established a 1901 society (legal status), presidency/leadership roles, annual report, size of volunteer activity depends on size of alumni population in region, moving across schools, publicizing events across schools through central University club.
- Whitney in Minnesota (whitney.windmiller@gmail.com) – Barnard women meeting separately, selecting committee members from the schools in order to broaden boards, hosting more events where they give back to the community (not just social events).
  o Determining dues structure and what each level entails.
- Paris uses Amiando (like eventbrite) for processing payments to events, use dues to subsidize event prices for dues-paying members.
- Persella in Cyprus (ipersella@gmail.com) – becoming incorporated currently, changing to a fee-structured club, trying to attract a Russian audience, proactively searching for alumni in the area, and entice them to attend events.
- Lindy in Palm Beaches (lgallagher82@gsb.columbia.edu) – 6 people on board; they only want proven, hard-working volunteers.
- Eric Gebaide in Long Island – maintain a flow of inbound and outbound leadership, tiers of volunteers, movement from the bottom up.
  o Do recruiting and double-recruiting – leaders find people at events and ask them to bring someone else along.
  o Committees meet monthly to plan specific events.
- Roxann in Atlanta (rss48@columbia.edu) – assigned positions, many committees with just one member, no term limits, but they stagger their election so that 1/3 of the board is elected each year.
  o Voting is for paid members at the annual meeting/holiday party.
  o Nominations come from the board, 250 word bio/platform.
  o Former presidents become ex oficio members of the board.
  o If they leave, it’s often for a reason – too busy, moving, etc.
    ▪ Keep them involved by making them a part of a committee, making sure they still attend events.
- Michigan is incorporated but looking to obtain 501©3 status – looking for help from attorneys in getting this status
  o There are great examples on available on the IRS website.
  o You don’t need to spend additional money for this service – outlined online.
- UAE is building a temporary website (Wordpress) and focusing on social media prior to the NationBuilder rollout.
- Boston wants to establish a book award program.
- Please refer to categorization matrix for programming and available funds.

ARC Discussion:
- Naples, FL has a good relationship with ARC members.
- Boston board has an ARC representative.
- Miami is looking to reach out.
- Atlanta and Boston have ARC chairs on their board.
- Palm Beach, FL and Michigan have good relationships with their area ARC committees, but they are separate entities from the club.

NationBuilder Updates:
- Boston, Long Island, and Miami have live sites
- Palm Beaches, FL is close to being ready to go live
- Megan Krasney is NationBuilder admin here at CAA (mk3660@columbia.edu)
- International rollout very soon
  - Think about who you want to be an admin for your site
  - Facebook integration from the Business School
- Miami – when you search for Miami on CAA website, it still takes you to the old site. Will work on getting all links updated.
- London is eager for rollout

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