



THE OHIO STATE UNIVERSITY

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# **Officer Overview & Best Practices Part I**

## ***President & Vice President***

May 31, 2017

Leslie Shoaf, Regional Engagement Officer: Western US

Brendan Braaten, Regional Engagement Officer: Southeast

**The Ohio State University Alumni Association**



# 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.



## President

- Supervises all alumni group affairs and provides leadership/vision for alumni group.
- Establish short and long-term goals.
- Organize and run board meetings
- Serve as liaison between the alumni group and OSUAA.
- Delegate responsibilities and tasks to board officers, build rapport, and resolve conflicts.
- Preside at group events, represent the alumni group and the university professionally and enthusiastically.
- Keep alumni group on track for its goals.
- Build relationships with alumni group community, local businesses (when applicable), and with university staff.

## Vice President/President-Elect

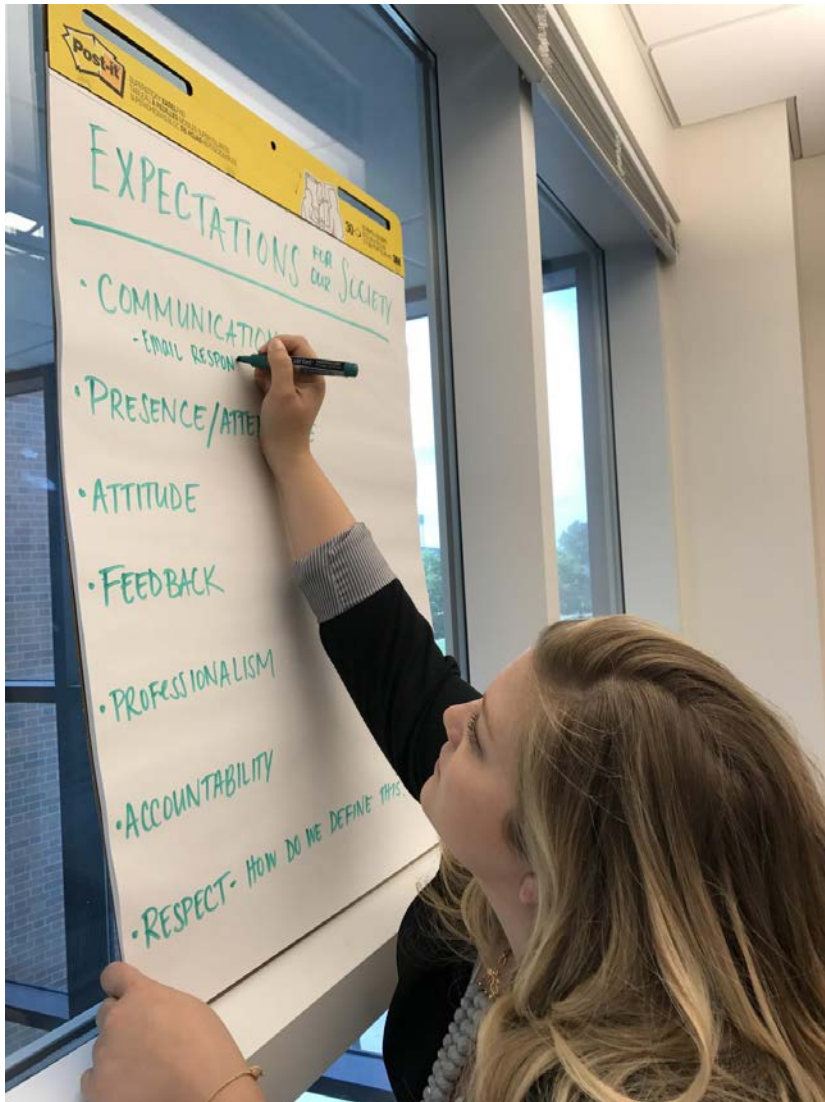
- Perform duties of the President in his or her absence (vacation, departure from position, etc.)
- Coordinate with the President on responsibilities with short-term, long-term goals (the “how”).
- Follow-up with board officers on tasks, deadlines, and goals (for example, have committee chairs report to VP instead of Pres).
- Build rapport with board officers and relationships with group members.
- Fills in when needed for BOG responsibilities (if you don’t have an events committee, VP can coordinate events, for example).
- Might drive fundraising strategy



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

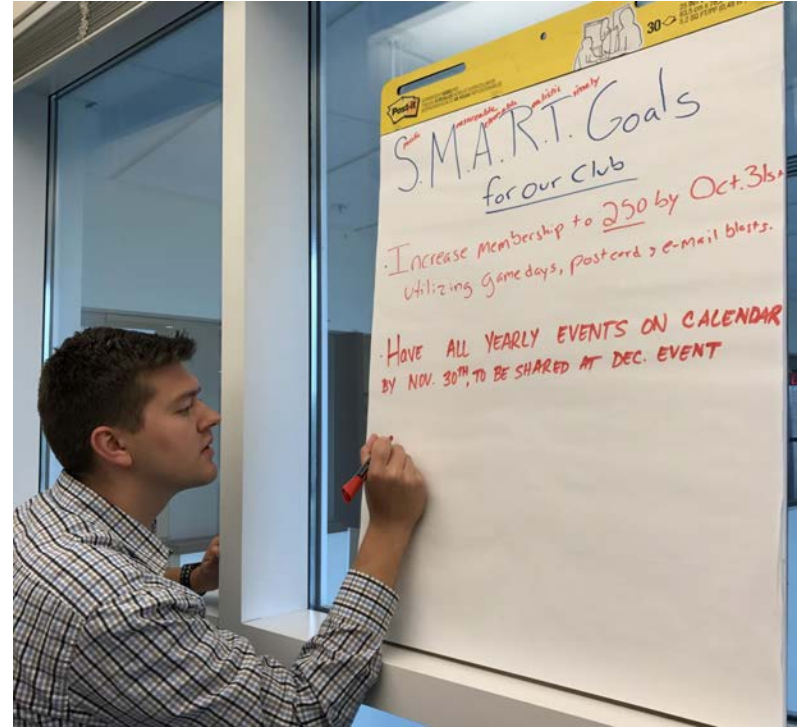


## S.M.A.R.T. Goals

**S**pecific (simple, sensible, significant).  
**M**easurable (meaningful, motivational).  
**A**chievable (agreed, attainable).  
**R**elevant (reasonable, realistic and resourced).  
**T**ime 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.







## THE OHIO STATE UNIVERSITY

### ALUMNI ASSOCIATION

## 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.

Month	Scarlet (\$2000 at end of fiscal year)	Gray (\$1000 at end of fiscal year)	Carmen
January	Board Meeting Championship Game Watch	Board Meeting	
February	Scholarship Committee Review	Scholarship Committee Review	
March	Game Watch (Basketball)	Game Watch (Basketball)	Game Watch
April	Board Meeting 5K Race Event (up to \$250)		
May	Guest Speaker Event & Dinner (up to \$250)	Guest Speaker Event & Dinner (up to \$250)	
June	Annual General Body Meeting & Social	Annual General Body Meeting & Social	Annual General Body Meeting
July	Buckeyes After Work (up to \$500)		
August	Board Meeting Student Send-Off (up to \$250)	Student Send-Off (up to \$250)	
September	Attend Club & Society Leadership Symposium	Board Meeting Attend Club & Society Leadership Symposium	Attend Club & Society Leadership Symposium
October	Board Meeting Game Watches (Football)	Game Watches	
November	Game Watches	Game Watches	Game Watch
December	Board Meeting Volunteer at Local Soup Kitchen (up to \$250) Holiday Party	Holiday Party Volunteer at Local Soup Kitchen (up to \$250)	



## THE OHIO STATE UNIVERSITY

ALUMNI ASSOCIATION

### Sample Calendar of Events for The Ohio State Alumni Association Societies

Month	Scarlet (\$2000 at end of fiscal year)	Gray (\$1000 at end of fiscal year)	Carmen
January	Board Meeting & OSU Men's Basketball Tailgate and Game	Board Meeting (up to \$50)	
February		Buckeye Love Annual Fundraising E-Mail Campaign (up to \$250)	
March	Wine Tasting Scholarship Fundraiser (up to \$250)	Buckeyes & Broadway (up to \$250)	
April	Board Meeting Graduating Senior Reception (up to \$250)		
May	Guest Speaker Event & Dinner (up to \$250)	Guest Speaker Event & Dinner (up to \$250)	
June	Family Picnic Event at the Columbus Zoo		
July	Buckeyes After Work Young Alumni Networking (up to \$500)	Board Meeting (up to \$50)	
August	Board Meeting (up to \$50)	FYE Book Club Program (up to \$250)	
September	Attend Club & Society Leadership Symposium	Attend Club & Society Leadership Symposium	Attend Club & Society Leadership Symposium
October	Homecoming Tailgate & Annual Membership Meeting	Homecoming Tailgate & Annual Membership Meeting	Board Meeting
November	Buckeyes & Broadway (up to \$250)		
December	Board Meeting Volunteer at Local Soup Kitchen (up to \$250) Holiday Party	Holiday Party Volunteer at Local Soup Kitchen (up to \$250)	





## 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*

### **A Buckeye Evening**

**Thursday, March 16, 2017**

*Ed & Jenna Gonzalez' Home*

### **Golf Tournament**

**Monday, May 1, 2017**

*Country Club of Naples*



## Happy Hours

**Thursday, September 15, 2016**

*Inn at Pelican Bay*

**Thursday, April 20, 2017**

*Paradise Wine*

**Thursday, May 18, 2017**

*Bellasera Hotel*

## Meet and Greet

### **Buck-I-Serv Students**

**Monday, December 19, 2016**

**Monday, March 13, 2017**

**Monday, May 8, 2017**

*Stevie Tomato's Sports Page*

**For More Information visit**

**[www.NaplesBuckeyes.com](http://www.NaplesBuckeyes.com) or contact**

**Sara Ann Mousa at 239-593-9196**



## 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



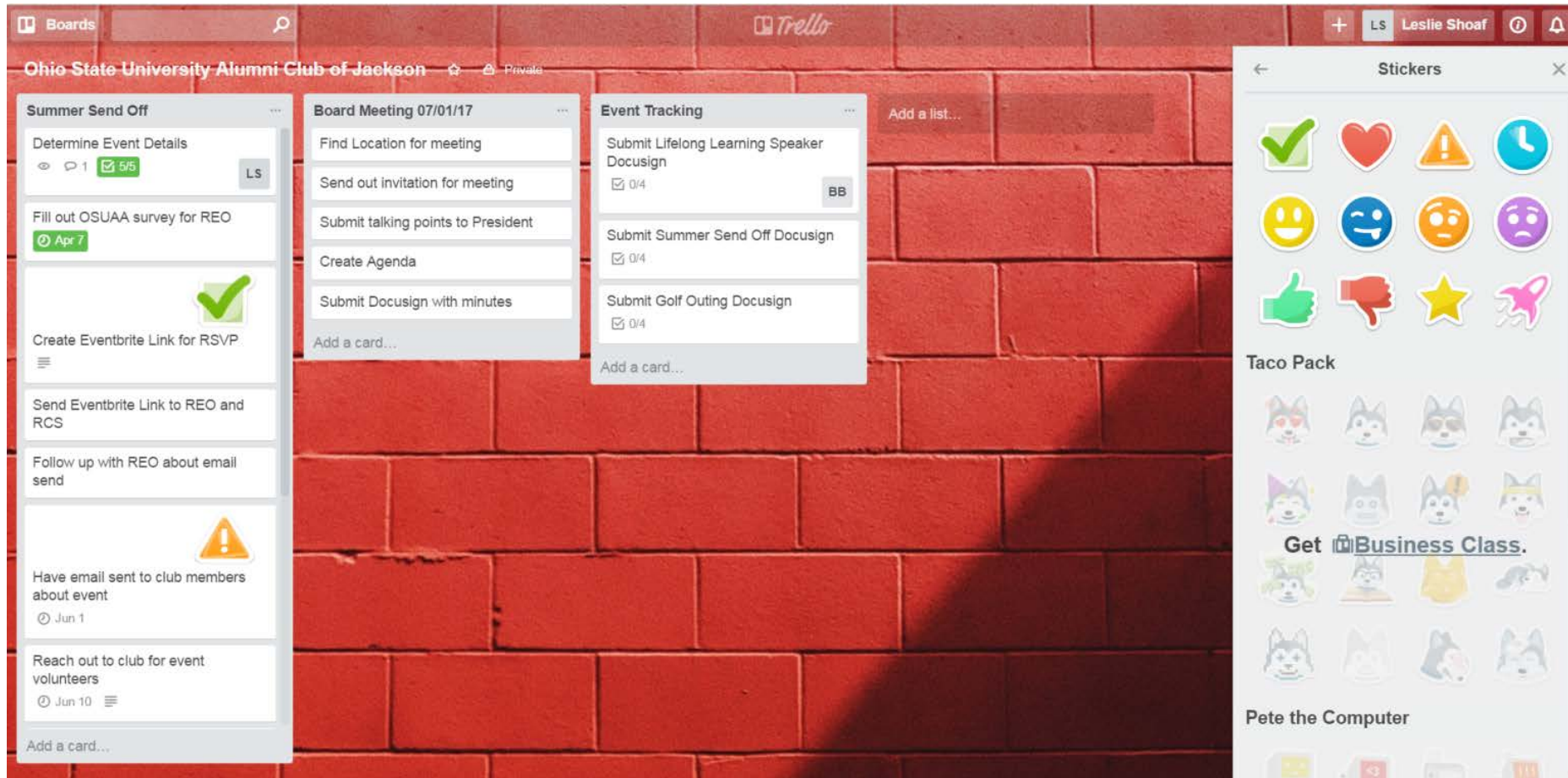
## Strategies for Communication

- 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>



## 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





## 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](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





## Surveys

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



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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

ing opportunities

and culture events

recruitment and/or interactions

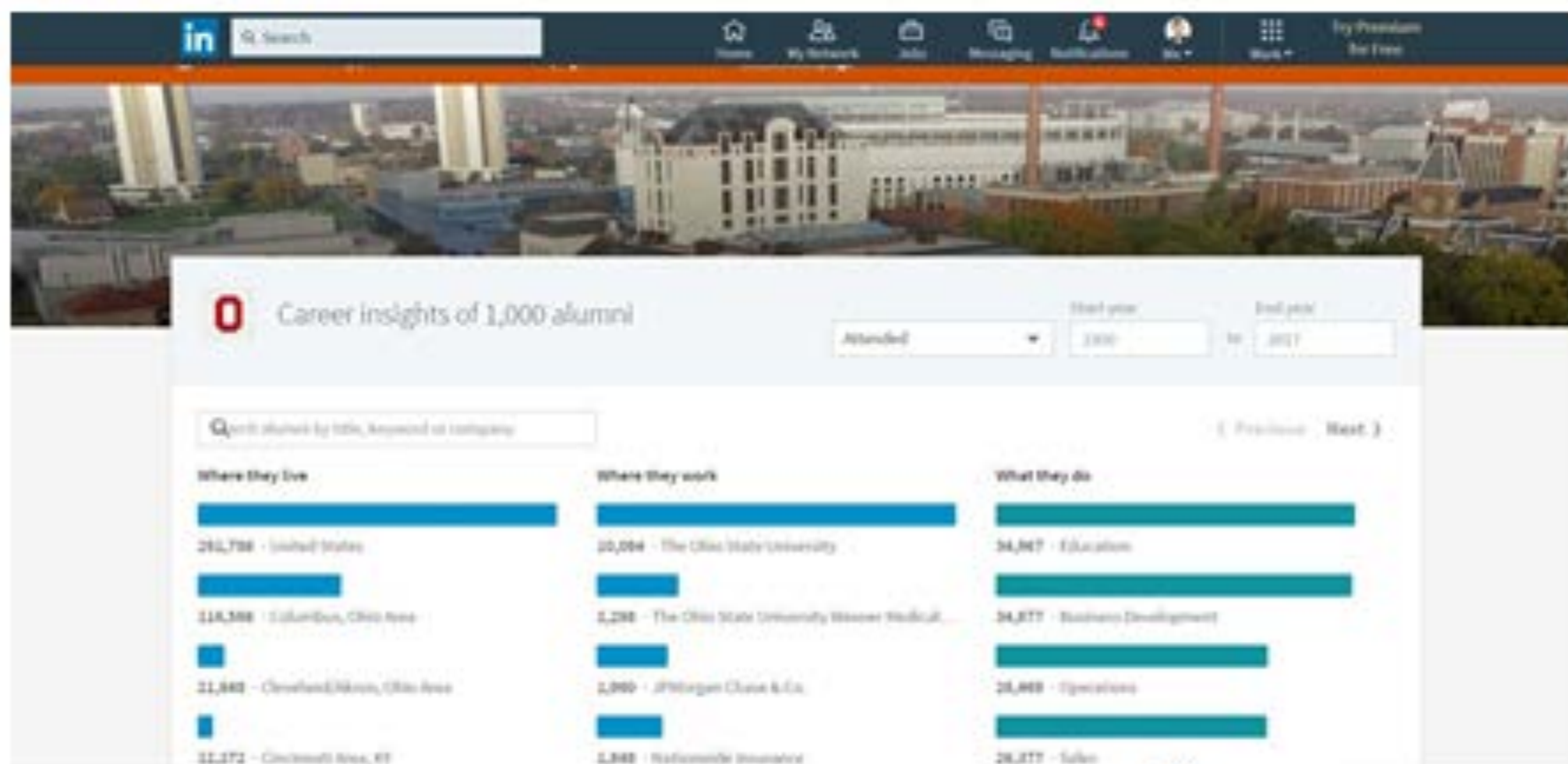
onal and learning opportunities

ours

tertainment, attractions and festivals



- "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](https://www.linkedin.com)





- Ohio State student/alumni mentoring network
- [osu.alumnifire.com](http://osu.alumnifire.com)

The screenshot displays the Alumni Fire website's 'Buckeye Directory' search results for 'Charlotte, NC'. The interface includes a top navigation bar with links for Home, Ohio State, and Posts, along with a user profile for Brenden Braxton. A left sidebar contains a search bar with 'Charlotte, NC' entered and a list of filter categories such as Location, Degree Information, Degree, Group, Industries, What They Offer, and Whether They're Hiring. The main content area shows three search results:

- Zakiya Collins '04**: Assistant Manager / Inventory Specialist at Massage Envy Spa • Education/Management • Charlotte, NC. Offering: General career advice.
- Brett Braxton '13**: Client Services Manager at TeamQuest Interactive • Marketing and Advertising • Charlotte, NC. Offering: General career advice, Informational Interviews, and Resume reviews & feedback.
- Craig Stern '92**: Peer support specialist at Little George services • Individual & Family Services • Charlotte, NC.



- *“Seven Steps to Running the Most Effective Meeting Possible”*
- *“The Cheat Sheet for Robert’s Rules of Order”*
- *“How to design an agenda for an effective meeting.”*
- *“SMART Goal Examples”*
- *“How to run a powerful, purposeful board retreat.”*
- *“Managing Conflict: A Guide for Volunteer Boards.”*



# What We've Covered



# Q & A



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