

**BROWN**ALUMNI  
ASSOCIATION



# Club Leader Toolkit

DECADES OF COLLECTIVE CLUB LEADER TIPS,  
DEFINITIONS, AND RESOURCES

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## Have a Question?

CONTACT YOUR ALUMNI RELATIONS CLUB LIAISON:

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## Have Something You'd Like Us to Add?

We're always looking for ways to improve.

Please let us know: [alumni\\_clubs@brown.edu](mailto:alumni_clubs@brown.edu).

## Clubs' Mission Statement

What's at the heart of every club? The lifelong alumni-Brown connection. And you provide the glue by:

- Providing opportunities for social and professional networking.
- Continuing alumni education through speaking programs featuring Brown faculty, administrators or distinguished alumni.
- Creating meaningful engagement for alumni with the University.
- Developing volunteer leaders of all ages through participation in club leadership roles.



# Getting Started: Small Clubs



## HELLO, SMALL CLUB LEADERS.

You have less than 1,000 alumni in your geographic area, but you blaze big in Brown's heart. Thank you for helping alumni stay engaged with Brown in meaningful ways.

*Remember:* you're not going it alone! The Brown Alumni Association (BAA) is here for you, whether you need tech support, financial resources, or a sympathetic ear.

## FIRST—ARE YOU OFFICIALLY A CLUB?

In order to maintain an affiliation with the BAA (and all the perks that come with that affiliation), please do:

- hold at least two – four gatherings each year.
- maintain a core team of at least three officers (typically President, Treasurer, and Communications Officer).
- keep in touch with members through at least two-four BRAVO email broadcasts each year.
- remember that each of your events and communications must exemplify the [mission](#) of Brown University.
- stick to your [bylaws](#).

## TIME TO FIGURE OUT WHO THESE LOVELY CLUB MEMBERS ARE! CONSIDER:

### What is the geographic focus for your club?

A city, greater metropolitan area, or an entire state, region, or country? (That is, how far will people have to travel to get to your events?)

### What are your members' demographics?

You can obtain some information through a BRAVO data download, which provides demographic and zip code information.

### What do your members like to do?

What do they wish this club would provide? Try asking them! Use a BRAVO email blast or send a survey via SurveyMonkey.com.

## WHAT ARE THE HALLMARKS OF A HAPPY CLUB?

1. A volunteer team with three or more from all walks of life—and from several decades of alumni graduation years. It's nice to mix it up! (AND, how can you plan events for all ages if you only have one age represented on your team?)
2. A willingness:
  - to share the work (don't be a martyr!) by letting all interested alumni volunteer,
  - to ask for help (gulp) by soliciting new volunteers, and
  - to let go of the reins at the right time by letting new leaders take over. Remember this maxim that we just made up: Good leaders work like dogs; great leaders delegate.
3. Bi-monthly brainstorming meetings for the leadership team to discuss goals, coordinate volunteers, and more
4. One or two event(s) per season—alumni want to network socially and professionally!—some of them recurring, such as a book club meeting, young alumni happy hour, sporting events or family events.



5. Frequently updated website and Facebook pages (aren't you online 24 – 7 anyway?)
6. A “learning never stops” mentality, demonstrated by organizing events where Brown faculty, administrators, or distinguished alumni speak.
7. Regular check-ins with the Brown Alumni Association and the University.
8. Making friends across the “aisle”—working with the Alumni Interviewing Program, and/or reaching out to other Ivy League, Ivy-Plus or “Ivy and Co.” alumni clubs.

#### WHO ELSE IS SIMPATICO WITH YOUR CLUB? (GLAD YOU ASKED.)

For advice and brainstorming help, reach out to:

1. Brown Affinity Groups:
  - [A4](#)                      • [IPC](#)                      • [NABA](#)
  - [BULAC](#)                      • [TBGALA](#)
2. Your Alumni Interviewing Program Area Chair or Regional Director
3. Other Ivy League, Ivy-Plus or “Ivy and Co.” Alumni Clubs
4. The robot that keeps the University calendars
  - [Alumni Events calendar](#)
  - [Brown Athletics calendar](#)
  - [Brown University campus calendar](#)
5. [Brown Club Leaders' Café](#) (free virtual cappuccinos!)
6. [Brown Club Leaders' Facebook Group](#)

#### WHAT ARE THE PERKS OF BEING AN OFFICIAL CLUB?

Substantial support from the BAA.  
Here's how we can help:

##### Real-live-people-just-a-phone-call-away support

- Genesis Camacho, Program Assistant: 401-863-6307
- Imanah Mahmoud, Program Manager: 401-863-9598

##### Planning your event

- This [handy checklist](#)
- Online event registration sites to accept credit card payments
- Online reports that help manage your club's events
- Brown name tags
- Brown napkins  
(nothing but the best for your club members' mouths)

##### Developing your team

- Best practices trainings and calls
- One-on-one calls when you need it
- [Succession](#) planning
- Volunteer recruiting assistance
- Partnerships and collaborations with other alumni groups, University contacts and student groups

##### Communicating with your audience

- This all-in-one [communications cheat sheet](#)
- BRAVO (which includes broadcast email, website templates and the BAA dues and events system)

##### Funding

- Your [finances cheat sheet](#)
- Annual Funding for operations
- Program Funding for programs and events
- BRAVO dues & events system: Clubs can create online event registration sites to accept credit card payments and membership dues, and run event and membership reports





# Getting Started: Medium Clubs

HAPPY MEDIUMS, UNITE!



## HELLO, MEDIUM-SIZED CLUB LEADERS.

You have 1,000 to 2,500 alumni in your geographic areas, and that, as Goldilocks would say, is just right. Thank you for helping alumni stay engaged with Brown in meaningful ways.

*Remember:* you're not going it alone! The Brown Alumni Association (BAA) is here for you, whether you need tech support, financial resources, or a sympathetic ear.

## FIRST—ARE YOU OFFICIALLY A CLUB?

In order to maintain an affiliation with the BAA (and all the perks that come with that affiliation!), please do

- hold at least four – eight gatherings each year.
- maintain a core team of at least five officers (typically President, Vice President, Treasurer, Events Chair and Communications Officer).
- keep in touch with members through at least three BRAVO email broadcasts each year.
- remember that each of your events and communications must exemplify the [mission](#) of Brown University.
- stick to your [bylaws](#).

## TIME TO FIGURE OUT WHO THESE LOVELY CLUB MEMBERS ARE! CONSIDER:

### What is the geographic focus for your club?

A city, greater metropolitan area, or an entire state, region or country? (That is, how far will people have to travel to get to your events?)

### What are your members' demographics?

You can obtain some information through a BRAVO data download, and you can request demographic and zip code lists from [alumni\\_clubs@brown.edu](mailto:alumni_clubs@brown.edu).

### What do your members like to do?

What do they wish this club would provide? Try asking them! Use a BRAVO email blast or send a survey via SurveyMonkey.com.

## WHAT ARE THE HALLMARKS OF A HAPPY CLUB?

1. A volunteer team with 10 – 15 or more members from all walks of life—and from several decades of alumni graduation years. It's nice to mix it up! (AND, how can you plan events for all ages if you only have one age represented on your team?)
2. A willingness
  - to share the work (don't be a martyr!) by letting all interested alumni volunteer,
  - to ask for help (gulp) by soliciting new volunteers, and
  - to let go of the reins at the right time by letting new leaders take over. Remember this maxim that we just made up: Good leaders work like dogs; great leaders delegate.
3. Monthly brainstorming meetings for the leadership team to discuss goals, coordinate volunteers, and more.
4. A robust committee structure, for example, young alumni, women, events, marketing, communications, membership, and/or multicultural committees, to meet the diverse needs and interests of your club members.



5. Three or six events per season—alumni want to network socially and professionally!—some of them recurring, such as a book club meeting, young alumni happy hour, sporting events or family events.
6. More members! And more, and more. Lost, lonely Brunonians are out there. And your aggressive marketing can find them.
7. Frequently updated website and Facebook pages (aren't you online 24 – 7 anyway?)
8. A “learning never stops” mentality, demonstrated by organizing events where Brown faculty, administrators, or distinguished alumni speak.
9. Regular check-ins with the Brown Alumni Association and the University.
10. Making friends across the “aisle”—working with the Alumni Interviewing Program, and/or reaching out to other Ivy League, Ivy-Plus or “Ivy and Co.” alumni clubs.

#### WHO ELSE IS SIMPATICO WITH YOUR CLUB? (GLAD YOU ASKED.)

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##### 2. Your Alumni Interviewing Program Area Chair or Regional Director

##### 3. Other Ivy League, Ivy-Plus or “Ivy and Co.” Alumni Clubs

##### 4. The robot that keeps the University calendars

- [Alumni Events calendar](#)
- [Brown Athletics calendar](#)
- [Brown University campus calendar](#)

##### 5. [Brown Club Leaders' Café](#) (free virtual cappuccinos!)

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##### Developing your team

- Best practices trainings and calls
- One-on-one calls when you need it
- [Succession](#) planning
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- Partnerships and collaborations with other alumni groups, University contacts and student groups

##### Communicating with your audience

- This all-in-one [communications cheat sheet](#)
- BRAVO (which includes broadcast email, website templates and the BAA dues and events system)

##### Funding

- Your [finances cheat sheet](#)
- Annual Funding for operations
- Program Funding for programs and events
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# Getting Started: Large Clubs

WELCOME TO THE BIG LEAGUES.



## HELLO, LARGE-SIZED CLUB LEADERS.

With over 2,500 alumni in your geographic areas, yours is a vast kingdom of Brunonians. Thank you for helping them stay engaged with Brown in meaningful ways.

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## FIRST—ARE YOU OFFICIALLY A CLUB?

In order to maintain an affiliation with the BAA (and all the perks that come with that affiliation), please do:

- hold at least eight – ten gatherings each year.
- maintain a core team of at least seven officers (typically President, Vice President, Treasurer, Events Chair and Communications Officer).
- keep in touch with members through at least six BRAVO email broadcasts each year.
- remember that each of your events and communications must exemplify the [mission](#) of Brown University.
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TIME TO FIGURE OUT WHO THESE LOVELY CLUB MEMBERS ARE! CONSIDER:

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# Suggested Yearly Timeline

## YOUR WHAT-TO-DO-WHEN SNAPSHOT



### JULY

#### Event planning

- Start planning [September and October events](#) in detail.
- Host a summer BBQ, picnic, or bon voyage party for local members of Brown's newest class (conspire w/ Alumni Interviewing Program leadership on this one!).

#### Finances

- Review the past fiscal year's expenses.
- Establish next year's [budget](#).

### AUGUST

#### Finances

- Consider applications for [BAA Program Funding](#) and [BAA Annual Funding](#).

#### Business Operations / Communications

- Recruit new [board members](#) to fill any vacancies.

### SEPTEMBER

#### Event planning

- Outline the year's events.

### OCTOBER

#### Event planning

- [Host your first event](#) of the new school year!
- Would a holiday party suit your club? If so, now's the time to plan!

#### Finances

- Deadline is approaching! Fill out your [BAA Program Funding application](#) for October – February events.
- Your first event is over: now, review your budget.

#### Business Operations / Communications

- Events = recruiting time. Look for both new club and board members.

### NOVEMBER

#### Event planning

- Start planning Jan – March events in detail.

#### Finances

- Review your [budget](#).

### DECEMBER

#### Event planning

- Enjoy the holiday party and the whole holiday season.
- Don't forget to invite current parents and students to your January events.

### JANUARY

#### Event planning

- Start planning April – June events in detail.
- Host BrownConnect Event.

#### Finances

- Review your budget.
- Consider applying for [BAA Program Funding](#) for March – April events.



### Business Operations / Communications

- Are your young alumni, families, and older alumni being offered events of interest to them?
- Use a [survey](#) to find out.

### FEBRUARY

#### Event planning

- [Get your club connected](#) with current students. Start planning a June BrownConnect event—when students are home on break.

#### Finances

- Review your budget.

### Business Operations / Communications

- In the month of Cupid, consider what makes a good match! Is the fit between key jobs (co-president, treasurer, communicator, webmaster) and the alumni filling them a good one?
- Tweak the [club leadership](#) line-up for maximum effectiveness.

### MARCH

#### Event planning

- Nail down your upcoming spring event.

#### Finances

- Review your budget.

### APRIL

#### Event planning

- Plan summer events.

#### Finances

- Consider applying for [BAA Program Funding](#) for May – October events.
- Review your [budget](#).

### Business Operations / Communications

- Think about the [club's leadership](#) for the next fiscal year; whose term will be up? What positions are unfilled that you would like to fill?

### MAY

#### Event planning

- Summertime, summertime, and the plannin' is easy... Consider [summer activities](#).

#### Finances

- Hey, that [budget](#) isn't going to review itself!

### Business Operations / Communications

- Finalize [club leadership](#) for the next year.
- Browse [these pithy leadership sayings](#) for inspiration/procrastination.

### JUNE

#### Event planning

- Meet with new club leadership.
- Plan [fall events](#).
- Host BrownConnect event.

#### Finances

- Give a final review of the past year's budget.
- Draft proposal for next year's budget.

### Business Operations / Communications

- Pat yourself on the back for a job well done (Who are we kidding? A pat? You deserve a spa day.)





# Club Events

SOCIAL BUTTERFLIES WANTED.



## EVENT TIPS: A CHECKLIST

Planning an alumni event? Start here for ideas on building a great alumni experience. Check ‘em out, then check ‘em off.

### 2-3 MONTHS BEFORE THE EVENT:

1. Repeat after me: I won’t be an event martyr. As your mother may have said, Many hands make light work. Gather several volunteers and assign specific tasks to each individual. It’s more fun and less stressful to share the work.
2. Choosing the right date and time is half the battle. For strategies, consult the [Club Leaders Suggested Yearly Timeline](#). Be sensitive to school vacations, community schedule patterns, religious holidays, major local events, and workday hours. And consider how well your event fits into your overall annual activity calendar.
3. Define your vision.
  - What is the name of the event?
  - What would you like the program to accomplish?
  - How can you appeal to the broadest range of your alumni population?
- Who else can help you plan it? Is it time to form a committee?
- Will there be entertainment?
- Will there be an education component?
- How formal or informal should it be?
- And the question on everyone’s lips: Will there be refreshments?
4. Scout the site (and bring a local Brunonian with you). Considerations:
  - whether the location is non-discriminatory and handicap-accessible
  - parking ease and public transportation accessibility
  - per-person food minimum charges (provided by the locale or caterer)
  - overall rental cost
5. Ask alumni who live in the area for input and assistance. They may have recommendations, connections, or be willing to donate their time or services at a reduced rate.



6. **Stay one move ahead.** Depending on the location of your event (and/or the amount of time you have between multiple events) you may need to think about transportation. For younger groups, consider public transportation options. If most people are driving to the event, be sure to include information about safe and accessible parking options. For multi-day events, research local charter services and see if they offer discounted rates for special groups, seniors, etc.

7. **Talk money—then talk it up!** What is the total budget required for the event? Consider:

- Expenses of speakers or other program participants
- Room and equipment rental fee
- Refreshment costs
- Publicity costs
- How will the event be funded?
- What's your attendance estimate, and what ticket price will help you either break even with costs or go over budget by only a small amount?
- If your group does not use the BRAVO Dues & Events software, who will handle the RSVPs and what is the deadline for them? (Pro-tip: set your RSVP date a few days before your caterer needs the final count!)

8. **It's not too early to start getting people excited!**

Use Facebook and other online vehicles to let alumni know to save the date. Ensure that your event's date is included in any other Brown emails or promotional materials.

### 6 WEEKS BEFORE:

1. **Make some noise!**

- How will you spread the word? Consider your group's website and/or Facebook page, the Alumni Event Calendar, and BRAVO email blasts.
- Would Ivy Clubs or special interest organizations like to know about this event?

- Would a news release to local newspapers increase the audience?
- Who might appreciate a direct call? Phone alumni in the area to encourage them to attend.

### 3 WEEKS BEFORE:

1. **It's propmaster time.**

2. **Who's ready to help?** Coordinate with your fellow event planners. Recruit sufficient volunteers to staff the name tag table, register walk-ins, and greet guests.

3. **Consider securing for your event:**

- Audiovisual equipment, if applicable
- A flyer promoting your upcoming gatherings
- Your very own Brown banner (to commission one, contact [alumni\\_clubs@brown.edu](mailto:alumni_clubs@brown.edu))
- Biographical materials to help you write your speaker introductions (if applicable)
- Gifts for speakers or hosts (if applicable)
- Create timeline for event and share it with others staffing the event
- Printouts of the lyrics to the Brown [Alma Mater or other fight songs](#)
- Brown name tags and napkins! (contact [alumni\\_clubs@brown.edu](mailto:alumni_clubs@brown.edu))

### DAY OF:

1. **On the big day...**

- Bring the RSVP list (one copy for each person checking in attendees), the cash box (if applicable), and any items you secured after checking off #8 (see above).
- Be on site early to set up registration, test A/V equipment, welcome guests and take photos.
- Review event timeline with volunteers staffing the events so everyone knows what they are responsible for.



- Check in with your fellow event planners and with the event speaker (if applicable).
- Make sure your volunteers are working the door and socializing with guests.

#### DAY AFTER:

##### 1. You're almost done! Post-event loose ends.

- Make everyone who couldn't come jealous. Post your photos online, and update your class blog/website with highlights.
- Send emails to:
  - all guests, thanking them for coming.
  - volunteers on your team, applauding their efforts.
  - your staff liaison, including a list of attendees, photos, and your own feedback on the event.
 Club leaders, fill out your [event report](#).
- Pay any bills.
- Then, deep breaths... you did it!  
(And you're awesome.)

## Helpful One-Page Info Sheets

#### FOR UNIQUELY BROWN EVENTS:

[Back To Class with Brown Faculty](#)

[First Readings](#)

[Season of Service](#)

[Clubs Diversity Plan for Programming](#)

## Examples of Successful Events

The best-laid plans of bears and Brunonians often go... awesomely. Here are some creative ideas for fun events that will bring your classmates together.



#### ANYTIME IS THE RIGHT TIME FOR:

##### BOOK CLUB

Natural Prophets:

From Health Foods to Whole Foods by Joe Bobrow '85

Phoenix Public Library, 6:00 – 7:30 pm

Cost: \$10 (includes light refreshments)

Joe Dobrow '85 will present his latest book, *Natural Prophets: From Health Foods to Whole Foods*, a behind-the-scenes story of how a group of idealists rebelled against the Big Food establishment to create a whole new, whole foods world including Celestial Seasonings, Whole Foods Market, Stoneyfield Farm, Earthbound Farm, Silk, and more.

##### HAPPY HOUR

Thirsty Thursday

Sydney, Australia, 12:00 pm

Cost: Pay as you go

We hope those of you who were able to make it enjoyed our last Brown Thirsty Thursday at Sydney Town Tavern. Never fear, we will be continuing the Thirsty Thursday tradition every third Thursday of the month! April's





Thirsty Thursday will be held at Southern Pacific Brewing. Come one come all to drink away your sorrows about missing Dave Binder, who is performing this weekend at Spring Weekend (unless of course you are flying across the country...100% worth it).

## CAREER PANEL

### The Brown Club of Boston and BrownConnect Alumni Career Panel

*The Non-Profit Center, 89 South Street, Boston, MA*

*Cost: Free for current students; \$5 for young alumni (0 – 5 years); \$10 for alumni/guests.*

*6:00 pm, Check-in and light refreshments*

*6:30 – 8:00 pm, Program begins*

Stay connected! The BCOB in partnership with BrownConnect, will be hosting an alumni career panel with speakers from a variety of industries and class years. BrownConnect is a University-wide initiative aimed at both increasing student access to internships and research opportunities and creating more opportunities for students and alumni to connect.

## FALL EVENTS:

### KICK-OFF PARTY

#### Speakeasy or Dance Hard

*The Flatiron Room, 37 West 26th Street, 7:00 – 12:00 am*

*Cost: \$25*

Step back in time to the speakeasy charm of the FlatIron Room, featuring 500 different types of whiskey, luscious cocktails from a renowned mixologist, all the appetizers you can eat, and open bar for three hours.

DJ Louie XIV of Boom Boom Room and Hotel Chantelle fame spins all night. Eat. Drink. Dance. Hobnob in the conversation lounge upstairs. Win amazing prizes from our fantastic sponsors. Meet new friends from Brown or hang out with your best friends from Brown. The only thing that's prohibited is missing out on the Brown Club in NY's biggest party of the year! RSVP now. Or, bring 10 friends and RSVP for a special price. \*All prizes include membership in the Brown Club in NY for one full year.

## SPORTING EVENT: TAILGATING

Check the [Athletics Composite Schedule](#) to see if Brown teams are coming to your area.

### Pre-Game Tailgate: Brown vs. Cornell Men's Lacrosse

*Brown Club of Rhode Island*

*Stevenson Field, Providence, RI*

*Cost: \$5 for children under 12; \$10 for Premium club members; \$10 for club members, parents and guests.*

Stevenson Field, Parking Lot #1 (adjacent to the field, behind Olney Margolies Athletic Center) Look for a white canopy tent with the BCRI Banner.

*11:30 am, Tailgate*

*1:00 pm, Game Time*

Join us at Stevenson Field to cheer on Brown's men's lacrosse team as they take on Cornell! Enjoy tasty tailgate fare, Brunonian camaraderie AND see some exciting lacrosse! The Club will provide vegetable and meat calzones, chips, sweets & beverages. Also, feel free to bring your favorite tailgate treats to share!

## WINTER EVENTS

### FAMILY ICE-SKATING PARTY

#### Family Friendly Ice Skating

*Brown Club of Washington, D.C.*

*Pentagon Row Outdoor Ice Skating Plaza, 1201 S Joyce Street, Arlington, VA, 2:00 pm - 4:00 pm*

*Cost: \$9 Adult; \$8 Children + \$3 Skate Rental (if needed)*

Bring the kids and join fellow Brown alums with family and friends for his winter family-friendly event; it is a great reason to brave the chilly weather this weekend! Skate for the full two hours or just as long as you like before enjoying coffee or hot chocolate from the adjacent Starbucks around the rink fire pit.



## UGLY SWEATER PARTY

### Ugly Sweater Party

*Brown Club of Miami*

*Better Days, 500 Brickell Building, Miami, FL,*

*6:00 pm – 9:00 pm*

*Cost: Free (pay as you go for food/drinks)*

Kick off the Holiday Season with the Brown Club of Miami at an Ugly Sweater Party! Everyone is encouraged to wear their most gruesome sweater. Drink specials will be available.

## SPRING/SUMMER EVENTS

### MUSEUM / BOTANICAL GARDEN EVENT

#### Private Tour: *China: Through the Looking Glass*

*Brown University Club in New York*

*Metropolitan Museum of Art, 1000 Fifth Avenue, New York City, NY, 9:00 – 11:30 am*

*Cost: \$47.00 for club members; \$51 for non-members*

Join our exclusive Metropolitan Museum of Art pre-hours VIP private tour of the acclaimed Costume Institute's exhibition *China: Through the Looking Glass*. Marvel at the exquisite designer creations influenced by Western visions of the Far East. Following our private walk-thru enjoy a light breakfast menu with fellow Brown alum and their guests in the expansive American Wing Café with Central Park views.

### SPORTING EVENT: BASEBALL GAME

#### Annual Alumni Red Sox Game

*Brown Club of Boston*

*Fenway Park, 4 Yawkey Way, Boston, MA, 7:10 – 10:00 pm*

*Cost: \$32.95 for club members; \$39.95 for non-members*

Catch yourself missing that annual spring semester pilgrimage to the PawSox game? Join the Brown Club of Boston in cheering on the Boston Red Sox! We have reserved a block of bleacher seats for the August 14th game against the Seattle Mariners. This annual tradition is one of the Club's most popular events, and seats always go fast.

# How to Secure a Faculty Speaker

**NOW YOU'RE TALKING! (BROWN PROFS SPARK THE BEST CONVERSATIONS.)**

**Three easy steps to securing a speaker for your club:**

1. Fill out a [request form](#) at least three months in advance of your event.
2. Submit the form to your [club liaison](#) or [alumni\\_clubs@brown.edu](mailto:alumni_clubs@brown.edu). AR staff will contact the faculty member on your behalf and continue to serve as the contact between the club and the faculty member.

### This isn't your grandfather's lecture hall

Many topics defy your wildest imaginings. Visit the alumni events calendar for inspiration.

## BEST PRACTICES FROM LONG-TIME VOLUNTEERS

### Venue

Choose a location that is handicapped accessible, near public transportation, has parking, and a good size for your number of anticipated attendees.

### Fees

Charge a per-person fee for this event, even if the actual costs to the club are minimal. Club leaders have found that if a fee is collected (even as little as \$5), alumni make a commitment to attend.

### Greeting attendees

Set up a registration table at the event entrance for name tags, check-ins, and walk-in registration. Registration sets the stage for a great event.

### Program format

*Start the faculty speaking program with the club leader, who will:*

- introduce themselves and welcome the attendees
- recognize and thank those members who have been instrumental in organizing the event



- most importantly, introduce the faculty speaker using the biographical information supplied by Alumni Relations
- thank the speaker for taking the time to visit the club, and
- explain the parameters of the Q & A (if one will follow the lecture)

*When the program is scheduled to end, the club leader should:*

- stand and “wrap up” the Q & A session (or, if no Q & A, simply initiate the applause)
- thank the speaker again for the interesting program and for traveling to the area.

#### **Pre or post-event**

If the faculty member’s schedule allows, treat him/her to lunch or dinner. Make your invitation and reservations at least two weeks prior to the event. Program funding can help to cover the cost of this meal.

#### **Gifts**

Present the speaker with a gift of thanks at the conclusion of the program. This gift is often an item representative of the club’s location. If an event is held in a private home, clubs usually present a gift to the host who has generously opened up his or her home.

#### **Other helpful event logistics**

- Cell phone # exchange! Ensure that the club leaders, the faculty member and the Alumni Relations staff member exchange cell phone numbers.
- Unofficial chauffeur. The club may offer to pick up the faculty member at the airport, train station or hotel. The Alumni Relations staff member, if attending, could also assist with these transportation needs.

## **Planning a Networking/ Career Event**

### **HELP CONNECT ALUMNI AND BOOST CAREERS!**

What type of event are you thinking of hosting?  
Here are some ideas:

#### **Networking mixer**

Provides a comfortable, informal setting for alumni to make new connections, with exercises optional. *Works well for:* young alumni, small/medium/large clubs

#### **Career transition panel**

Alumni with career transition experience plus an HR professional offer advice. *Works well for:* alumni 10+ years out, medium/large clubs

#### **Industry workshop**

Three or four alumni from various segments of a particular industry discuss working in that industry. *Works well for:* everyone!

#### **Multi-industry fair**

Alumni circulate among staffed tables to gain insight into multiple industries. *Works well for:* young alumni, medium/large clubs

### **HOW DO YOU DECIDE WHICH CAREER EVENT FORMAT WILL WORK BEST FOR YOUR CLUB?**

Consider the following:

*The economic situation in your area*

- What are the industries that thrive in your community?
- Are there industries that are fading out?
- Are people likely to be interested in career changes because of necessity?
- Is entrepreneurship an area to be explored profitably in your community?
- Would a series of career events benefit your community?





### *The ages and life stages of your alumni*

- Do young alumni predominate? If so, they might be best served by informal networking or multi-industry types of events.
- Are there more alumni 10+ years out? They might well appreciate a career transition event or an event that focuses on the industries in your community that are doing well.

### **Need a write-up?**

Check out these examples of [successful career/networking events](#).

## Communications

**GET THE 411 ON CONNECTING WITH CLASSMATES.**



### **PLANNING AN EVENT? NEED TO PROMOTE IT?**

Follow these tips to ensure your invitation gets seen by your people. It's as easy as 1-2-3...4-5-6.

*(On a related note, if you're the one planning the whole shindig, check out this handy-dandy event checklist to see what you should be doing when.)*

1. Use a BRAVO email blast to make an early save-the-date announcement. Send this announcement as early as you can—up to four months before the event. No need to worry about a recipient list: BRAVO will take care of it for you!
2. Need an invitation template? No problem! Check out [this invitation template with photos](#) and [this invitation template without photos](#).
3. Consider your audience. Some may prefer electronic communications like email and Facebook. Older alumni may respond better to a formal print announcement / invitation with a schedule of events.
4. Send BRAVO email blast reminders once a month leading up to the event.
5. Share who's coming. Seeing a familiar name on the list can greatly influence a person's decision to sign up. BRAVO can automatically generate a list of attendees (omitting anyone who opts out, of course)—all you have to do is enable the list.



6. No matter the event, be sure to publicize it on the alumni events calendar! If you create your event in BRAVO, it will automatically go into the calendar. If you use another platform, please send the info to [alumni\\_clubs@brown.edu](mailto:alumni_clubs@brown.edu).

### AND DON'T FORGET THE BASICS!

Even the best and brightest of us needs a gentle reminder now and again. No matter your volunteer role, please remember:

- **Plan ahead.** When you reach out to others can be as important as what you say. Consider building a communications timeline. Take into account what other Brown events (like Reunion!) your group may want to build upon—or work around.
- **BRAVO! will be your best friend.** Yes, this is applause for the generous way you're sharing your time, but it's also a hint. Would you like to reach your constituents? Start with BRAVO (BRown Alumni Volunteers Online), a suite of helpful web-based applications. New BRAVO feature: You are now able to invite Brown parents!
- **Get to know your audience.**  
Contact [alumni\\_clubs@brown.edu](mailto:alumni_clubs@brown.edu) to obtain a summary report of your group's demographics. The more you can tailor your message to them, the better.
- **Share the good news!** With so many great alumni events and accomplishments, it can be hard to keep up. Consider which updates your group might need and want to know. Then broadcast them, via a BRAVO email, your group's website/Facebook/ Twitter/ Instagram, blog, or a combination.
- **Invite—and give—feedback.** As a volunteer leader, you may be coordinating several people and events at once. Your fellow volunteers will appreciate your invitation to reflect on how the volunteer team is working, and the Alumni Relations staff in turn will appreciate any ideas you might have on how to improve the volunteer experience in the future.

### NEWSLETTERS

- **Templates:** Microsoft Word has templates to get you started, or you can contact your volunteer liaison for help. Here's a [sample](#).
- **Who to?** Get mailing lists from your staff liaison.
- **Regularity:** Newsletters should be sent in a timely and regular manner (but, if sending through email, don't overwhelm those inboxes!). Between September and mid-June is the best time to send a Clubs newsletter.

#### Content Ideas

*For Clubs:*

- A letter from the club president
- Highlights of Club events (upcoming and previous)
- Photos from events
- A profile of alumni in the area and/or Brown faculty that have been in the news
- Highlights of [University events](#)

Proof, then proof some more! Ask other class leaders and your liaison for help.

#### Mail or email? That is the question.

- If printing, you should get two or three quotes from different print vendors to make sure you are getting the best price for the quality you are getting.
- Also ask them for samples of their work.
- Note: Your group (class, club, or association) is responsible for paying all expenses.



# Administrative Resources

SOMETIMES IT'S THE SMALL THINGS THAT CAN MAKE THE BIGGEST DIFFERENCE.



## ROLES AND RESPONSIBILITIES

For happy & healthy leadership teams, consider adhering to these size suggestions:

- Small clubs = 3+ officers
- Medium clubs = 5+ officers
- Large clubs = 7+ officers

## CORE ROLES FOR SMALL, MEDIUM, AND LARGE CLUBS:

Presidents or Co-Presidents work with other volunteers to plan and produce activities year-round. Presidents organize periodic meetings of the organization to ensure that activities are coordinated, operating on schedule, and on budget. This officer is usually the chief contact with the Alumni Relations office on campus and participates in club leader conference calls several times a year.

As per standard [bylaws](#), the recommended term limit is two years to maximize the number, effectiveness, and diversity of regional volunteers. Co-Presidents generally have staggered, overlapping terms to promote continuity.

Treasurers are responsible for holding the assets of the organization, handling financial transactions, and keeping financial records.

The Communications Officer/Chair/Secretary is the main conduit of communications for the club and with Brown. He/she develops and manages a club communication strategy while working with the club leadership. He/she keeps the club informed on University and club news through BRAVO emails and ensures that the club website is maintained.

*That's usually all small clubs need. Read on for additional suggested roles.*

## ADDITIONAL ROLES FOR MEDIUM AND LARGE CLUBS:

Vice Presidents share the responsibility for coordinating the efforts of the club with the President.

Secretaries keep other Board Members and club members up to date on meetings, minutes, etc., and work with communications volunteers to be sure alumni are aware of the latest happenings locally and at Brown.

Webmasters manage online postings for regional alumni club websites.



**Program (a.k.a. Social Events) Chairs** plan and implement events for the local Brown community. They work to develop a calendar for the year with other program-specific alumni volunteers. Successful events often include book groups, progressive dinners, send-off parties for new freshmen, or anything else that your creativity suggests.

**Membership Chairs** identify ways to increase membership and participation in activities. They also work with the Treasurer to track dues and payments, if fees are charged. With the consent of the local alumni, the Membership Chair may also coordinate publishing a directory of club members.

**Newsletter Editors** write newsletter copy (print or online) and gather material for inclusion in the local club newsletter from other board members and alumni.

**Publicity or Marketing Chairs** use email and / or print materials to market and publicize the club's events. In some clubs, the marketing chair also promotes club membership.

**Young Alumni Coordinators** find creative ways to reach younger alumni in the area. With 25% to 50% of alumni in certain areas being fairly recent graduates, there may be some special interests and needs for a dedicated volunteer for this position. Young alumni are a great way to grown your volunteer pipeline.

**Regional Multicultural Representatives** work to connect alumni of color in the local area to each other, to the larger local Brown community, and to the University through social, cultural, educational and service activities. They promote multicultural programming to the broader alumni community through their club newsletter and coordinate events specifically for alumni of color. In your area, this might be one person to connect to all alumni of color (regional Multicultural Alumni Committee representative) or it might be the leader of a local chapter of the Inman Page Black Alumni Council (IPC), the

Brown University Latino Alumni Council (BULAC), or the Asian/Asian American Alumni Alliance (A4).

**All-Ivy Chairs** represent the club in all aspects related to other Ivy League, Ivy-Plus, or Ivy & Co. clubs in the area and help plan joint events.

**Life Stage Resource:** An alumnus or alumna who self-identifies as a resource for a particular life stage, such as working mothers; stay-at-home mothers; people in career transition; alumni considering retirement, or others.

**Women's Committee Chairs** coordinate issues which are relevant to alumnae club members.

**Shared Interest Groups** provides opportunities for alumni to connect and reconnect to fellow alumni based on common interests such as industry, profession, and military service.

#### AND, WAIT, THERE'S MORE:

You might want to consider filling other program-specific roles, such as:

- Career Networking Coordinator
- Entrepreneurship Program Liaison (contact the [Brown University Entrepreneurship Program](#))
- Book Club/Brown Author Series Leader
- [Brown University Sports Foundation](#) Liaison
- "Classifieds" contact (for housing, jobs)
- Fundraising / Event Coordinator (regional scholarship, etc.)
- Office Administrator (mail, voicemail, etc.)
- Outreach Coordinator (multi-Club, all-Ivy, professional networks)
- Pembroke Center Associates Liaison
- Regional Public Service Coordinator
- Summer / Student Involvement Coordinator





## CLUB BYLAWS

If your club has bylaws already, congratulations! If not, download our model bylaws (for [small](#), [medium](#), or [large](#) clubs) to help you establish your own.

### Benefits to having bylaws:

1. The process of establishing them is a great tool for helping your Brown club define itself and its goals.
2. Bylaws provide a more hospitable structure for volunteering. If your volunteers have term limits, they will willingly serve for the two or sometimes more years of their term. Volunteer leadership opportunities should be open to all, which isn't possible without the orderly transition that term limits provide. If there are no term limits, the result is likely to be harmful to the club, because alumni will either be reluctant to volunteer in the first place or will burn out by serving for too long.

### Keep us in the loop!

We'd love to know if your club has bylaws. If you do, please send a copy to the [alumni\\_clubs@brown.edu](mailto:alumni_clubs@brown.edu).

## SUCCESSION

To lead is awesome. To abdicate, divine.

### Is this scenario familiar?

Things are humming along smoothly with your club. You've kept your eye out for your replacement—because you want to follow your club's bylaws and avoid the dreaded "leader burn-out"—and now you've found him/her. Then someone objects: "You are doing such a good job. We just think you should continue." Suddenly, you're second guessing yourself. "I really am doing a good job. I think that I'd like to finish up a couple of things before I give up this work."

### Go while they still want you to stay

...is the cardinal rule of dinner parties and club leadership. Believe the hype—you are a good leader! But that just makes a stronger case for you to step down. Part of your responsibility is to cultivate a new set of club leaders, and then to make a clear, smooth transition.

### Laying the groundwork

Many organizations set a limit on the number of years its leaders can serve, which makes it clear to everyone when a new leader is needed. The BAA sets a good example by electing a President-elect who can learn the ropes and then automatically take over fully prepared. It's healthy if your role as immediate past chair/president is somehow recognized, perhaps with continuing membership for one year as President Emeritus or Chairperson Emeritus on the club's board of directors.

### New challenges await!

Give the new club president some space as he/she picks up where you left off. Instead, seek new leadership opportunities within the BAA's ranks by voicing your desire with other volunteer leaders or by contacting BAA staff (see page 3). The BAA is hungry for the vision of experienced volunteer leaders like you.



# Finances and Funding

**WATCH THE CENTS, AND THE DOLLARS WILL TAKE CARE OF THEMSELVES!**



## Where does club money come from?

- Annual funding
- Membership dues
- Program funding
- Income from events

[Learn more.](#)

## How much should a club spend annually?

The answer is different for every club, but no matter the size of your club, follow these budget planning tips:

- Establish the budget before the start of the program year if possible, and if not, by November at the latest.
- Estimate income based on last year's income.
- Estimate expenses based on planned events and their projected costs.
- Adjust the planned activity schedule to ensure that anticipated expenses do not exceed anticipated income.
- Consider the full calendar year in developing the budget.
- Fiscal prudence dictates that one should not increase the projection of income without a clear idea of where that increased income will come from.

Monitor the budget versus expenditures regularly to see if projections are still on target. If one of your early programs is less successful than anticipated, review future expenses to determine where cuts can be made.

## Who oversees the club's budget?

Each club elects or appoints a [Treasurer](#). The Treasurer's responsibilities may vary, but generally include:

- Work with the president or co-presidents and the board to establish a viable budget for the coming year.
- Manage club bank accounts.
- Manage revenue collected through events.
- Manage annual dues collection and recording process (in some cases, this may be the job of the [Membership Chairperson](#)).

## Where should a club keep its treasury?

Keep a bank account in the name of the club at a local bank for the following:

- Deposits
- Writing of checks
- Savings
- ATM cards

## Can a Brown Club be tax exempt?

Yes. As non-profit organizations, Brown clubs can enjoy an exemption from federal income tax by electing to participate under the umbrella of the Brown Alumni Association.

If you are interested in joining or are uncertain if your club already participates under the umbrella, please contact your [club liaison](#). The BAA will share with your club a "group exemption letter" which allows subordinate organizations (i.e., local clubs) to operate under its 501(c)(3) exemption without the necessity of filing a separate application.

## Does a club need to file taxes?

If gross receipts are under \$50,000 and the club is not included in the Brown Alumni Association's group exemption letter, the club must file a postcard return – 990N. If the club fails to file the postcard for three consecutive years, the club's tax exempt status will be revoked by the IRS. If the club is included under the BAA's group exemption letter, the club only needs to submit an Annual Funding application and include its financial information. The BAA will handle filing of the Form 990.



## Does federal tax exemption extend to state and local taxes too?

Please note that inclusion under the BAA umbrella does not, in and of itself, exempt your club from applicable state or local sales tax. However, once you participate, you can apply to the appropriate local authorities for such an exemption. Exemption from state tax does not impose greater restrictions than those contained in Section 501(c)(3) of the Code.

To apply for exemption from your state's taxes, you need to request and complete the appropriate form from your state's Department of Taxation. As under the federal Code, Brown clubs qualify for exemption from state taxes as "charitable and educational organizations" (note: 501(c)(7) "social and recreational clubs"). While this form will require a detailed description of your current and proposed activities, if your club is exempt from federal income tax under the Brown umbrella, you can use the list of activities listed to secure that exemption as a resource. We can also give you a copy of the most recent IRS determination letter to include with your state tax exemption application.

## GENERATING INCOME

Where does my funding come from, anyway?

### Finances: income and dues

There are four sources of club funding. Consider tapping all four for a healthy treasury (and more fun events).

1. Apply for BAA Annual funding every fiscal year
2. Apply for BAA Program funding for uniquely Brown events
3. [Annual dues](#)
4. Charge event entrance fees

## 1. ANNUAL FUNDING FROM THE BAA

Annual funding supports club operations, such as board meetings, communications, supplies and services purchased to support club business, as well as events. Brown clubs can request funding by completing the [BAA Annual Funding Application](#) that is sent to all club leaders once per year (generally in August), with a deadline generally falling in October. Clubs that apply can receive a payment from the BAA for each alumnus and alumna in the club's region as recorded in Brown's alumni database. The amount per alumnus/alumna is established each fiscal year. (See below for specifics on this year's funding levels and deadlines.)

### REQUIREMENTS, FUNDING LEVELS, AND APPLICATION DEADLINES

Requirement	2 club leaders from your board must join the <a href="#">Brown Club Leaders' Facebook group</a> .
Funding Level	\$0.50 per alumna/alumnus in the club's region
Application	<a href="#">BAA Annual Funding Application</a>
Deadline	Monday, October 22, 2018
Report	None required

Questions about annual funding? Contact your [club liaison](#).

## 2. PROGRAM FUNDING FROM THE BAA

Program funding is available to all Brown clubs through the [BAA Program Funding Grant Application](#). Applications are reviewed three times a year with deadlines generally in October, January and April. A funding cap is determined for each fiscal year (July 1 to June 30). (See below for specifics on this year's funding levels and deadlines.) Clubs can make a one-time request for maximum funding to support a large-scale program or event, or a club can make two or three smaller requests spread over the course of the year to support several programs or events.



Program funding is meant to allow a club to afford an otherwise unaffordable event that will give it new visibility and has the potential to recruit many new members.

**It is meant to be “seed money” to enable the club to do something different that, if repeated, can hopefully become self-funded in subsequent years. Funding is not intended to support the same event each year, but rather foster program innovation.** The use of free or inexpensive venues and inexpensive digital postcard invitations are encouraged, among other ways to host an event with reasonable costs. Some financial participation on the part of the club through event revenues or from funds collected from membership dues is also very important.

### FUNDING LEVELS, AND APPLICATION DEADLINES

<b>Funding Level</b>	All or part of an application funding request may be granted, up to a total of \$1,750 per club per fiscal year.
<b>Application</b>	<a href="#">BAA Program Funding Grant Application</a>
<b>Deadline</b>	Monday, October 22, 2018 for events that will occur from October 2018 to January 2019
<b>Deadline</b>	Monday, January 21, 2019 for events being held between February to June 2019
<b>Deadline</b>	Monday, April 22, 2019 for events occurring from July to October 2019
<b>Report</b>	Event Report

Questions about annual funding? Contact your [club liaison](#).

### 3. ANNUAL DUES

Whether to charge club dues, how much to charge, and the specific benefits of paid membership are left to the discretion of each individual Brown club. Some clubs rely on annual dues as an important way to generate income. Most clubs have opted to eliminate club dues altogether, and depend upon revenue from their events to fund activities. Clubs annual dues typically range from \$10 – \$50 per member. The basic model that must be followed for dues is as follows:

### ANNUAL MEMBERSHIP

*Structured on Brown Fiscal year (July-June)*

OPT-IN MEMBERSHIP CATEGORIES	BAA MINIMUM REQUIREMENT
<b>Brown Bear (Free)</b>	Complimentary membership for alumni with less than five years since graduation.
<b>College Hill (Lower Rate)</b>	Regular membership offered to alumni, parents, spouses, and friends of Brown. Each year, the club sets the amount and benefits for this membership.
<b>Ever True (Higher Rate)</b>	Premium membership offered to alumni, parents, spouses, and friends of Brown. Each year, the club sets the amount and benefits for this membership. This level of membership gives clubs the opportunity invite constituents to support the club at a higher level and, if desired, offer enhanced benefits for membership, (e.g., ticket discounts, first opportunity to order tickets for high demand events).

Clubs can use the BRAVO Dues & Events Online System (BD&E) to manage dues. The system offers Clubs the ability to monitor membership status, accept credit card payments online, send membership expiration notices via e-mail, and track payments made. To request access to the system, contact your Alumni Relations [club liaison](#).

### 4. INCOME FROM EVENTS

Income from events is determined by many factors, such as the overall cost of running the event or program and achieving the goal of making it affordable to all. In general, a worthy goal is to break even or earn a little extra money from an event to support future activities. Clubs rely heavily on donations of space and refreshments to keep expenses at a reasonable level so that the cost of an event does not become prohibitive for alumni, particularly young alumni.

