

## **Harvard Club of Southern California Policies and Procedures for Programs/Events**

### **HCSC's Mission**

The Harvard Club of Southern California (the "Club") is a non-profit organization whose origins date to 1901. The Club sponsors social, entertainment and educational events for our members throughout Southern California. Additional important Club functions include, but are not limited to, the following:

- Raising scholarship funds for Harvard College.
- Interviewing all Southern California applicants to Harvard College.
- Awarding summer fellowships to deserving Harvard students from the local area who work on community service projects.
- Awarding prize books to outstanding students at local high schools.
- Presenting awards at our Annual Dinner, including the John Harvard Award for Distinguished Community Service, and the Educator of the Year Award.
- Engaging in outreach to diverse Harvard constituencies.

### **Purpose of Events**

All events sponsored by the Club must have a connection or relation to Harvard, be in furtherance of the Club's mission, and must be approved by the Club's Vice Presidents of Programs as set forth herein before any advertising.

### **Procedure for Approval of Events**

Any proposal to conduct or organize an event must be approved by the Vice Presidents of Programs before it is advertised. The Organizer(s) needs to submit information regarding the proposed event to the Vice Presidents of Programs with as much advance notice as possible (*refer to policies below and the Event Information Form attached hereto for factors, costs and other issues to consider when planning an event*). When determined to be necessary by the Vice Presidents of Programs, the proposed event will be reviewed by the Club's President and/or the Board to determine its appropriateness.

### **Procedure for Advertising an Event**

Once an event is approved by the Vice Presidents of Programs, the event may be advertised on the Club's website as well as in the newsletter and on the Club's social media websites. To do so, the Organizer(s) must send all of the following information to the Vice Presidents of Programs (***Organizer(s) fill out and submit the Event Information Form attached hereto in order to ensure all of the necessary information is provided***):

1. Event Title
2. Brief Description of Event
3. Date
4. Time (start/end)
5. Location
6. Registration for all events must be done through the Club's website, including free events.
7. Registration costs must account for any of the following expenses in order to calculate the cost per person and determine membership and non-membership prices:
  - a. Cost for the venue/rental fees
  - b. Projector
  - c. Screen

- d. Microphone
  - e. Bartender
  - f. Flowers or other decorations
  - g. Parking
  - h. \*Food (meals/appetizers)
  - i. \*Drinks
  - j. \*Food and drinks will incur a gratuity charge, which is usually 20% of the cost
  - k. Tax
  - l. 3% of final cost to cover credit card fees (e.g. merchant fees)
8. Description of Parking Details (if any)
  9. Email and/or Phone Number of Organizer (or other person to be contacted if there are any questions or concerns)
  10. Email Attachment of a ".jpeg" image or picture to be posted on the website next to the event

The Vice Presidents of Programs will forward the information (or the completed Event Information Form) to the appropriate individuals to ensure the event will be advertised on the website, newsletter and on the Club's social media websites (Facebook, Instagram and Twitter). The Vice President of Programs will also update the Organizer(s) when this has been done. The Club Administrator will have access to the Club's website and the Vice Presidents of Programs will have access to the Club's social media pages.

The Organizer(s) is responsible for checking the accuracy of the program information when submitting it to the Vice Presidents of Programs on the website, in newsletter drafts and in any posts on the social media websites.

#### **Post-Event Procedures**

The Organizer(s) must submit any pictures and a brief summary of the event to the Vice President of Communications to include in the Club's newsletter.

The Organizer(s) must email event attendees, within a reasonable time after the event, the following:

Thank you for attending [NAME OF EVENT HERE]. It was a pleasure meeting you and getting to know you, and it was nice that you were able to meet other Harvard alumni and get to know the Harvard community here in Southern California. I would like to take this time to encourage you to become a member of the Club; if you graduated this year, you are already a member of our Club. I want to encourage you to take part in the many events we have planned. We offer a variety of programs that cater to many different needs; these include happy hour/networking events that take place at different locations throughout the city; mentorship opportunities; private tours of many of the attractions here in LA and the surrounding area; Science Pub speaker events; volunteer events at different charitable organizations; alumni talks, and of course, concerts. We also have a series of signature events such as our Annual Holiday Salon; the Harvard/Yale Telecast game; Global Networking Night; the Harvard Faculty Speaker; and our Annual Awards Dinner.

You can find a detailed list of these events by visiting our website at: <http://hesc.clubs.harvard.edu>. Also, make sure to join us on Facebook; search for Harvard Club of Southern California and follow us on Twitter and Instagram @HarvardSoCal.



We hope that you will join us at any one of these events and that you become acquainted with our community. We look forward to seeing you again!

Sincerely,  
[YOUR NAME]

### **Other Policies**

#### **Event Costs**

At all times, the cost of events will be covered by the participants' registration fees. Events should include tiered pricing for members and non-members to encourage membership to the Club (we suggest a \$10 difference). The Organizer(s) must pay for his/her own ticket to the event and should ensure that the Club will not lose any funds. If registrations to events are low, the Organizer(s) can work with the Vice Presidents of Programs to advertise the event to other Harvard Clubs and/or other Ivy League Clubs.

#### **Reimbursement of Expenses**

When an event requires a deposit in funds or a credit card, the Organizer(s) should contact the Club's Vice Presidents of Programs. The Vice Presidents of Programs will either: 1) contact the Club's Vice President of Finance to request a Club check; or 2) use their personal credit card, to then be reimbursed for the cost of the event. For reimbursement for an event deposit or any other expenses, the Organizer(s) must fill out and submit the Reimbursement Form attached hereto (including a copy of the receipt) as soon as possible but no more than four (4) weeks after the event to the Vice President of Finance. The reimbursement check will be mailed directly from Bank of America.

#### **Collection of Event Funds**

When at all possible, all event funds should be collected using the Club's registration website. If funds need to be collected on the day of the event, the Organizer(s) should opt to collect personal checks instead of cash. For any checks made out to the Club, please mail them to Terry Nathan, the Club's Administrator, at 1020 Manhattan Beach Boulevard, Suite 204, Manhattan Beach, CA 90266. Write in the memo line what the check is for ("Annual Dinner Recent Grad Ticket," "Broad Museum Tour Ticket," etc.). This will ensure it gets tracked to the right account. If you forget to do this, please let the Vice President of Finance know that you have sent a check to Terry (and what it's for) to make sure it is credited properly.

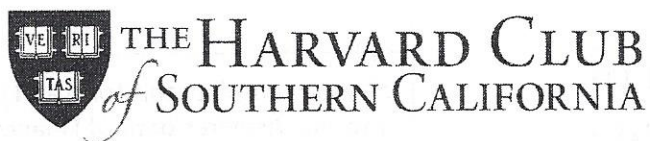
If cash is collected, each payment should document the individual participant's name, school affiliation, graduation year, and email address. Then the Organizer(s) needs to send the cash, along with a note detailing the event name, date, and total amount collected, to the Vice President of Finance or the Vice Presidents of Programs. The information collected will be sent by the Vice Presidents of Programs to the Club's Vice President of Finance, Executive Vice President and the Club's Vice Presidents of Membership. The collection of event funds should be fully completed as soon as possible, but no more than four (4) weeks after the event.

**Conflict of Interest**

Organizer(s) of events for the Club should ensure that all events are in compliance with the Club's Conflict of Interest Policy. Consistent with that Policy, events should not benefit the private interest of, or provide a possible excess benefit to, a member, officer or director of the Club, in a way that is inconsistent with the Club's nonprofit charitable status.

Likewise, the Vice Presidents of Programs shall ensure that the Organizer(s) of any event is prohibited from receiving any advantage, benefit or personal gain, monetary or otherwise (including, but not limited to, free tickets, admissions, gifts, etc.), in connection with any aspect of the event, including funds collected from the event through the website or on the day of the event.

The Club recognizes that not all events in which a financial interest or benefit is present would be precluded by the Club's Conflict of Interest Policy. If an event may raise questions regarding compliance with the Club's Conflict Interest Policy, the Organizer(s) should disclose the relevant facts to the Vice Presidents of Programs for further review.



\*Please complete this form and submit it to the Vice Presidents of Programs in order to advertise your event

## Event Information Form

<b>Organizer's Name and Email Address:</b>	
<b>Event Title:</b>	
<b>Brief Description of Event:</b>	
<b>Event Date:</b>	<b>Event Time (start and end):</b>
<b>Event Location:</b>	
<b>Registration Details:</b>	
<b>Event Costs and Member/Non-Member Prices Per Person</b>	
<b>Venue rental fee:</b>	<b>Food (meal, appetizers, etc.) cost per person:</b>
<b>Projector:</b>	<b>Drinks:</b>
<b>Screen:</b>	<b>Gratuuity (usually 20%):</b>
<b>Microphone:</b>	<b>Other:</b>
<b>Bartender(s):</b>	
<b>Flowers:</b>	
<b>Parking:</b>	
<b>Total Costs (sum of all costs above):</b>	
<b>+ Taxes:</b>	
<b>+ Merchant Fees (3% of Total Costs):</b>	
<b>GRAND TOTAL (Total Costs + Taxes + Merchant Fees) =</b>	
<b>Member price per person:</b>	
<b>Non-Member price per person:</b>	





# THE HARVARD CLUB of SOUTHERN CALIFORNIA

\*Please complete this form and submit it to the Vice President of Finance for reimbursement of any expenses incurred in connection with an event

## Reimbursement Form

<b>Organizer's Name and Email Address:</b>	
<b>Event Title:</b>	<b>Event Date:</b>
<b>Description of incurred expense:</b>	<b>Receipt (attach receipt here)</b>
<b>Date of expense:</b>	
<b>Amount of expense:</b>	
<b>Address where reimbursement check should be mailed:</b>	