

Wharton
ALUMNI
UNIVERSITY *of* PENNSYLVANIA

WHARTON CLUBS® NETWORK
CLUB MANUAL

Dear Wharton Volunteer,

Thank you for engaging with the Wharton School through the Wharton Clubs® Network! We are grateful to you for stepping into a leadership role within your region or affinity and delighted to welcome you to a global network of more than 800 volunteer leaders. Our 76 regional and affinity clubs are independent, volunteer-driven organizations that promote the School's commitment to offering top-quality programming and engagement opportunities for members of the Wharton community throughout the world.

To assist your dedicated efforts in leading your club, we have compiled this operational guide for you. In it, you will find:

- Contact information for your alumni relations staff liaison
- Standards and recommended guidelines for maintaining official Wharton Club status
- The University of Pennsylvania's privacy policy on alumni data
- Wharton's graphic standards for alumni clubs
- Resources and benefits available to you and your club
- Steps for starting or reviving a club
- Best practices for:
 - Club leadership
 - Succession planning
 - Legal issues
 - Membership and revenue
 - Communications
 - Events and programming
- Sample bylaws
- A guide for obtaining nonprofit tax status (for U.S. clubs)

Thank you again for your leadership and continued dedication to your club and the School. We trust that you will find your volunteer experience to be enjoyable and fulfilling. We are here as a resource for you and appreciate your ideas and suggestions in addition to all that you do for Wharton.

Best,

The Wharton Clubs Team

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WHARTON GLOBAL CLUBS TEAM

THE MISSION OF THE WHARTON GLOBAL CLUBS NETWORK is to advance the mutual welfare of the Wharton School and its alumni by providing opportunities for alumni to remain connected to the School and each other through lifelong learning, professional growth, and social interaction. The Global Clubs Network also serves both the School and its unparalleled alumni community by promoting and elevating the Wharton brand.

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THE GLOBAL CLUBS TEAM serves as the link between the Clubs Network and the School. The team provides strategic direction, maintains the overall operating infrastructure and guidelines, and offers support and resources to club leaders.

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THE ONLINE ENGAGEMENT TEAM provides opportunities for alumni to engage with the School online. The Online Engagement Team works closely with the Global Clubs Team on the rollout and ongoing support of club websites on the enterprise platform provided to clubs by the School.

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Please see Appendix A for full Wharton Club® listings.

MINIMUM STANDARDS AND RECOMMENDED GUIDELINES

Wharton Global Clubs—regional, professional, and special interest affinity groups recognized by the School—(“Wharton Clubs”) are established to advance the mutual welfare of Wharton and its alumni through high-quality programming and engagement opportunities. Wharton Clubs are representatives and stewards of the Wharton brand and must meet minimum standards to receive recognition from Wharton as an official alumni club.

Below are minimum standards for recognition from Wharton as an official Wharton alumni club. Official recognition is required to use the Wharton name and logo and to receive resources and support from the School.

Minimum Standards:

- 1.** Wharton Clubs must have a minimum of two officers or board members, including separate people fulfilling the roles of President and Treasurer. The President must be a degreed alumnus of Wharton and, for regional clubs, must reside primarily in the club's jurisdiction.
 - a.** A majority of the other officers or board members must be alumni of Wharton or the University of Pennsylvania.
 - b.** Joint Penn and Wharton Clubs must have a Wharton representative in a leadership role.
 - c.** The leadership team must convene as a group at least once a year, either in person or by phone.
- 2.** Wharton Clubs will operate using bylaws and share these bylaws with the School.
- 3.** Wharton Clubs will elect the President through direct election by members or through election by the respective club board. Terms for President and Treasurer will each be limited to three years, and one person may not be reelected to the same position for more than two terms, unless permission is granted in writing by the Wharton School.
- 4.** Wharton Clubs must keep monies in a separate bank account designated for the club. Dues, if charged, must be commensurate with the cost and benefits received by club members.
 - a.** For U.S. Clubs: If the annual income of the club is more than \$25,000, the club must file U.S. IRS Form 990.
 - b.** Club leaders may not receive compensation for their work on behalf of the club.

5. Any Wharton Club must have a potential membership minimum of 100 alumni for domestic clubs, and 20 alumni for international clubs. At least 75 percent of the membership base must be comprised of Wharton alumni.
6. Wharton Clubs must hold a minimum of two events each year.
7. Wharton Clubs must comply with the University's guidelines on the acceptable use of the University name, Wharton® name, Wharton Club® name, seal, logos, etc. Please refer to the full brand and graphic standards on page 7.
8. In all legal documents, advertisements, websites, marketing, and other materials, Wharton Clubs will use their full legal name and clearly identify that the responsible party is the club and not the School or the University of Pennsylvania.
9. Wharton Clubs must neither sell to any party nor disclose membership lists or private information of members to anyone outside of the club. Wharton Clubs must not use these lists or information for any purpose other than the benefit of the club without first obtaining explicit written approval from the School. Club officers must comply with the University of Pennsylvania Privacy Policy on alumni data, found here: alumni.wharton.upenn.edu/privacy-policy. The privacy policy must be signed by the Club President and any other officer that has access to alumni data.
10. Wharton Clubs must remain compliant with laws of local and national governments and not operate in a manner which is in conflict with one another or with Wharton.
11. A Wharton Club representative, usually the president, must maintain contact with the Alumni Relations staff by participating in an annual call, notifying the School of club elections and responding to requests for information and updates in a timely manner. The club representative must alert its staff liaison promptly when the club's contact information and officers change.

The Wharton School reserves the right to require any club to cease and desist use of the Wharton name and trademarks if it is not in compliance with these standards. The Wharton School is granting your club a nonexclusive, revocable permission to use certain trademarks, subject to the club and its members' adherence to standards established by The Wharton School.

Recommended Guidelines

1. Wharton Clubs should have 5-15 officers or board members, depending on the size of the club.
2. Wharton Clubs will plan events at least quarterly. Events may be of an educational, professional development, or social nature.
3. The club leadership team will convene as a group regularly, in person or by phone. The purpose of the leadership team meetings will be to discuss the club's management, upcoming events and programming, membership, succession planning/elections, and other club business.
 - a. These meetings should have recorded minutes; dissent to any items should be recorded in writing.
 - b. Wharton Clubs will prepare financial reports at least yearly and share these reports with members and the School in a timely manner.
4. Wharton Clubs will complete an annual update survey by the deadline set forth by the School.
5. Club representatives will participate in conference calls with other Wharton Club leaders and attend the Wharton Club Leadership Conference.
6. Wharton Clubs will help support the engagement efforts of Wharton Alumni Relations, including marketing Wharton events and programs when relevant and applicable to the club constituents.
7. Wharton Clubs will welcome and encourage participation in their programs and services by all Wharton alumni who may be interested and abide by the same policy of nondiscrimination adopted by the University.

UNIVERSITY OF PENNSYLVANIA'S PRIVACY POLICY ON ALUMNI DATA

All clubs must comply with the University of Pennsylvania's privacy policy on alumni data. Clubs must neither sell to any party nor disclose membership lists or private information of members to anyone outside the club. Clubs must not use these lists or information for any purpose other than the benefit of the club. Using alumni data lists for solicitations or political purposes is forbidden. Please reach out to your club liaison should you have any questions in regards to proper use of alumni data.

THIS POLICY MUST BE SIGNED BY THE CLUB PRESIDENT AND ANY OTHER OFFICER THAT HAS ACCESS TO ALUMNI DATA. THE FORM CAN BE SIGNED HERE: <http://alumni.wharton.upenn.edu/privacy-policy>.

GRAPHIC STANDARDS

The Wharton Alumni Logo

Elements of the official Wharton alumni logo may not be altered. Use of the alumni logo is limited to communication with current and prospective club members and for the execution of club business by clubs officially recognized by the School. The Wharton School may rescind its permission allowing a club to use the alumni logo and/or other School trademarks and logos, at any time.

Clubs not recognized by the School that wish to use the Wharton alumni logo must contact the Global Clubs Team for approval at globalclubs@wharton.upenn.edu.

Clubs recognized by the school may use the Wharton alumni logo on the following items:

- Business cards
- Envelopes
- Labels
- Letterhead
- Nametags
- Postcards
- PowerPoint presentations
- Table tents
- Websites

Templates and links to the Wharton alumni logo are available at www.whartonofficers.com under “Best Practices”.

Specialized Club Logo



Your club can request a version of the official Wharton Alumni logo that includes your club’s name. Contact your liaison for more information.



YOUR CLUB'S NAME

The Wharton School Colors

The Wharton School and the University of Pennsylvania share the same red and blue colors. Please find specific color information in the table to the right.

		
PMS	Pantone® 288	Pantone® 201
CMYK	100 - 65 - 0 - 30	0 - 100 - 65 - 34
RGB	0 - 44 - 119	152 - 30 - 50
HTML	#002C77	#981E32

Other Information

Wharton®, Wharton Clubs®, and certain other names and logos are registered trademarks of the University of Pennsylvania in jurisdictions around the world. This helps to ensure against unauthorized or inappropriate use and to maintain the quality and integrity of products and programs associated with the School and University that are identified with the Wharton and Penn names.

All Wharton Club events, awards, subgroups, marketing materials, and other initiatives must include the club name or an alumni designation, such as the Wharton alumni logo, to clearly indicate that it is autonomously owned or sponsored by the Wharton Club, NOT by or in conjunction with the School.

If you would like more information about the branding policies, please visit the Wharton Brand Identity website at:

www.wharton.upenn.edu/standards or the University of Pennsylvania Brand Identity website at:

www.upenn.edu/webservices/styleguide/standards.html.

The Wharton School reserves the right to require any club to cease and desist use of the Wharton name and trademarks, if it is not in compliance with these standards. The Wharton School is granting your club a nonexclusive, revocable permission to use certain trademarks, subject to the club and its members' adherence to standards established by The Wharton School.

CLUB RESOURCES

The Global Clubs Team offers a variety of resources to serve and support Wharton clubs as they, in turn, serve and support the alumni network. You can find links to these resources on www.whartonofficers.com.

With the completion of a signed Participation Agreement, Wharton clubs are eligible to receive a website on the School's enterprise platform. This website is produced at no cost to the club. A group **MUST** be an official, recognized club in order to receive this website, which offers a database of alumni in the region/affinity, email marketing, event registration tools, and tools for measuring activity and membership.

Resources for collaborating with other club leaders:

- Wharton Officers website: www.whartonofficers.com is an exclusive resource for club officers, featuring a variety of online resources, tips, best practices, and more.
- Wharton Officers LinkedIn Group: This group is a resource for officers to share best practices, post events and ideas, and ask questions.
- Wharton Officers listserv: The Global Clubs Team manages an email list of all 800+ club officers. Your club can use this resource to communicate with fellow officers across the network and share event announcements. The email address is club-presidents@wharton.upenn.edu.
- Wharton Club Conference: This conference brings together club volunteers to network, discuss best practices and common challenges, and take advantage of educational programming.

Wharton Webinar Series

Early registration is exclusively offered to club members one week in advance of the greater alumni community. Registration may reach capacity, and this exclusive benefit can help drive membership for your club. Access the series by visiting alumni.wharton.upenn.edu/webinars.

Other Resources

- [Event branding tools](#): Your staff liaison can provide a podium banner and a table skirt with the Wharton alumni logo upon request.
- [Custom Wharton Club® logo](#): Your staff liaison can provide a School-approved Wharton Club® logo for use on club branding materials
- [Giveaways and gifts](#): We have partnerships with several vendors from which your club can purchase Wharton-branded items. Your staff liaison can assist in the design and approval of custom products. Please follow the links below for our recommended vendor for your region.*
 - Domestic Clubs: <http://whr.tn/USsupplies>
 - European Union Clubs: <http://whr.tn/EUsupplies>
- [Wharton alumni data](#): Your staff liaison can provide contact information for all alumni in your club's region or affinity as requested. If your club is on the Wharton platform, your database of alumni will sync to and from the School on a nightly basis.
- [Wharton Blog Network](#): Club volunteers have the opportunity to blog on behalf of their club for the Wharton Magazine to promote their events, members, and more. This publication features 100+ regular contributors and serves as a platform to interact digitally with the global Wharton community.
- [Career services](#): Your staff liaison can work with your club and the offices of Undergraduate Career Services and MBA Career Management to tailor specific career programming to your region or affinity.
- [Discount at Wharton signature events](#): All club members are eligible to receive 50 percent off discounted tickets to regional alumni events hosted by the School. We also offer discounted tickets for a select number of club members to the School's flagship events (i.e. MBA Reunion Weekend, Global Forums). Please contact your staff liaison for more details.
- [Support in securing faculty speakers](#): If you are interested in scheduling a Wharton professor to speak, please contact your staff liaison before reaching out on your own. Given the extensive commitments of Wharton faculty, we cannot guarantee that we will be able to meet all speaker requests, but we will work with you to best accommodate the request.
- [Penn Alumni Regional Clubs resources](#): Penn provides various resources to their club leaders and members.** Please visit their website: www.alumni.upenn.edu/clubs.

**Other regions coming soon.*

***Penn's standards and benefits for their club network may not apply to Wharton Clubs.*

TEN STEPS TO START AN ALUMNI CLUB

1. Contact your staff liaison
2. Research history and analyze list of alumni in your region or affinity
3. Create a leadership team with at least two officers, although we recommend five to 15
4. Receive mentorship from an experienced club
5. Create bylaws with organizational structure and a succession plan
6. Open a bank account for collecting event payments and membership dues
7. Determine your website or social media presence
8. Survey all alumni in region or affinity to gauge interest and asses event ideas
9. Host your first event or general interest meeting
10. Keep going and maintain communication with your staff liaison

STARTING OR REVIVING AN ALUMNI CLUB

Are you interested in establishing a new Wharton Club in your region or affinity?
Do you want to revive a club that has become inactive?

Contact us at globalclubs@wharton.upenn.edu to get started. We will use the steps below as a framework for this process.

1. Assess feasibility:

- a.** After signing the privacy policy, your staff liaison will generate a list of all alumni in your region or affinity.
- b.** Your region or affinity must have a possible membership minimum of 100 (domestic) or 20 (international) alumni. At least 75% of the membership base must be Wharton and/or Penn alumni.
- c.** Your staff liaison can also tell you the history of activity in your area and connect you to any active Penn clubs in your region or affinity.

2. Convene a leadership team:

- a.** Once it is determined that there is critical mass to support a club, enlist additional alumni to assist in the planning and execution process.
- b.** A minimum of two officers/board members, with separate individuals fulfilling the roles of President and Treasurer, is required to proceed. The President must be a degreed alumnus of Wharton. In certain circumstances, the President may be a degreed alumnus of Penn with approval from the Wharton School.
- c.** The recommended number of leaders is five to 15 volunteers. The majority of the leadership team must be Wharton or Penn alumni.
- d.** The leadership team must meet at least once a year, but should plan to meet more frequently when getting started. Minutes should be recorded during these meetings.
- e.** The leadership team should agree on the goals and objectives of the club and brainstorm an initial list of potential activities. Clubs are required to hold at least two events per year. The recommendation is to hold events at least quarterly.

3. Establish a plan:

- a.** The newly formed leadership team should now schedule another call with its staff liaison. Your staff liaison will share best practices from other clubs and offer guidance and feedback.
- b.** Your staff liaison can also connect you with experienced volunteers from established clubs for mentorship and advice.
- c.** With the help of your staff liaison, your club will:
 - i.** Create a mission statement: A mission statement is the foundation of the club's goals and priorities. Every club should have a clear and defined vision for their purpose.
 - ii.** Institute bylaws: Bylaws offer organizational governance, set precedent for mediating conflict, and set forth your succession plan. You may draft your own version of bylaws, or adapt those provided on the Wharton officers website.
 - iii.** Open a bank account: A bank account should be opened in the club's name for bookkeeping purposes. Most clubs offer check-signing privileges to the President and Treasurer.
 - iv.** Launch an online presence: There are two primary ways to establish an online presence. Social media (Facebook, LinkedIn, etc.) is recommended for new clubs or clubs still organizing. For fully established and functioning clubs, Wharton offers a free website. This website serves as an administrative tool that links your club to the School's alumni database and offers tools for communication and event registration. If this website platform is not used, a membership list should be established. Your staff liaison can advise you on your best option for a web presence.
 - v.** Consider obtaining non-profit tax status (for US-based clubs): 501(c)(3) and 501(c)(7) are US Internal Revenue Service codes providing tax-exempt status to charitable organizations, including alumni associations, operating in the United States. The School does not advise for or against this process. International clubs are not similarly situated; however, we recommend that you contact your staff liaison if you have any questions.

4. Announce the Club:

- a.** Your staff liaison will add your club to our marketing materials and club directory.
- b.** Recruit new members by contacting all alumni in the region or affinity group. Your staff liaison will provide a list with contact data and a template for the announcement.
- c.** If your club has launched a website on the platform provided by the School, you can send a welcome letter to your new membership database using the website's email tool.
- d.** Your staff liaison can also help you develop a survey to better understand the demographics and interests of your membership base.
- e.** Hold an inaugural event. Your staff liaison can share best practices on event planning, realistic goals for attendance, marketing, and more.

5. Build momentum:

- a.** Many new clubs struggle to keep going after the first event. It is important to plan an event calendar for the upcoming year. Your staff liaison can share best practices for diverse events that will target different groups in your membership base.
- b.** Many clubs host signature events such as an annual gala, holiday party, or summer BBQ.
- c.** Partner with The Penn Club, other business school alumni groups, or the All Ivy or Ivy Plus groups in your region to cross market events. Consider co-sponsoring programs to help boost attendance for large and high-profile events. Solely working in partnership with other organizations, however, does not typically yield strong alumni participation, so be sure to balance co-sponsored events with Wharton-specific events.
- d.** We encourage all clubs to charge dues, which will help to build a solid financial base and enable the club to take on more ambitious initiatives in the future. Your staff liaison can provide examples and recommendations for dues structures.
- e.** Copy your staff liaison on all club communications, and participate in regular calls with your staff liaison to check-in on your progress.

BEST PRACTICES: CLUB LEADERSHIP, ORGANIZATION, AND MANAGEMENT

I. Club Leadership

A strong leadership team is essential to the success and sustainability of a club. The leadership team must meet at least once a year (ideally biannually or quarterly) to discuss the club's management, upcoming events and programming, membership, succession planning, elections, etc. It is recommended that minutes are recorded during these meetings and made available to the School.

REQUIRED CLUB ROLES ARE:

President

- Leads the club in its engagement, programming, and services for alumni in the region or affinity.
- Maintains responsibility for the overall operation, organization, and supervision of the club, including fiscal responsibility and the appointment/management of other officers and succession planning. The president usually acts as the primary contact with the Wharton School.

Treasurer

- Maintains and supervises club bank account, pays all club bills, and records sources of income. Collects and records annual dues. Prepares and submits financial statements to the officers. Prepares a full financial statement submitted annually to members. Files all required tax documents.
- For U.S. Clubs: If the annual income of the club is more than \$25,000, the club must file U.S. IRS Form 990.

RECOMMENDED CLUB ROLES ARE:

Vice President

- Maintains responsibility for the arrangement, coordination, and supervision of programs and services. Collaborates with officers to generate ideas and program strategy. Functions as presiding officer when president is unavailable. Depending on the size of the club, there may be more than one vice president with oversight for a specific function or committee within the club.

Secretary

- Attends all formal meetings and records and distributes minutes.
- Assists the club officers, particularly the president, in administrative matters.
- May be responsible for managing membership. If a club has a secretary as an officer, this role is responsible for informing the staff liaison of club elections, results, and meeting minutes. If a club does not elect to have a secretary as an officer, either the President or the Treasurer must agree to inform the staff liaison of club elections and results.

Webmaster

- Serves as the official point of contact for all matters related to the club website. Updates and maintains (or manages an administrator to update and maintain) all website content. Manages email communications and online event registration for the club, including initial troubleshooting. Handles administrative tasks as necessary to keep the website functioning properly, working with the Online Engagement Team and website vendor as needed.
- RECOMMENDED: Two individuals should serve as webmasters, dividing the responsibilities listed above based on your club's leadership structure and individual needs. Your staff liaison can provide guidance on selecting individuals for this role.

COMMITTEES/LEADERSHIP OPPORTUNITIES

Committees can benefit the structure of the club by assisting in programming, recruitment and retention of members, leadership identification, and succession planning. Some examples include:

Program Committee: Focuses on program and event planning and execution. This can be subdivided into speakers, social, etc.

Membership Committee: Focuses on membership recruitment and services/benefits.

Communications Committee: Focuses on the internal and external communication to members and the wider community. This may include website content.

Career Management Committee: Focuses on career development and job opportunities.

Student/Young Alumni Committee: Focuses on outreach to young and future alumni, and assists in planning welcome events for new graduates.

University Relations: Relationship management with Wharton and Penn (Club President is usually the primary contact with the school).

Advisory Boards

Many clubs have alumni who wish to be involved in an advisory capacity but not as fully active officers. For clubs with these types of volunteers, we recommend the institution of an advisory board. An advisory board may consist of former club officers, influential alumni with limited time resources, or alumni with connections to speakers and event space. The advisory board may provide strategic advice to the club and its officers. Your staff liaison can recommend a structure for your advisory board depending on the size and needs of your club. We recommend establishing term limits, guidelines around how these members are appointed, and specific expectations of the advisory board in the bylaws.

Note: Many clubs hire administrative staff part-time or for a set number of hours each month to handle various tasks, including mailings, event management, and website maintenance. The club is financially responsible for this service, but your staff liaison can provide recommendations for obtaining these services.

II. Succession Planning and Elections

Clubs should actively and continuously plan and reflect on succession of club officers. Your bylaws must include information on the succession process and specify officer term limits. Within a succession plan, it is important to outline the profile, qualifications, and priorities for the next club leader. Additionally, we recommend that the club determine when the succession process will actively occur, especially as it relates to elections for club officer positions. We ask the club to keep its staff liaison informed of developments and updates with regard to succession planning. Your staff liaison can provide onboarding checklists for new presidents and webmasters, as well as best practices and suggestions to help you plan for the continued success of your club. Your staff liaison can also provide you with an election manual to help you manage the election process. This manual includes resources for voting and communication templates.

III. Legal and Risk Management Issues

For clubs formed within the United States, the independent structure and management of non-profit organizations present potential legal issues surrounding tax status, liability, and insurance. Clubs may want to obtain non-profit tax status and carry the appropriate liability insurance. For more information, contact your club liaison.

For any club, however, one of the primary duties of the club is to define its mission and objectives, and ensure that the club is operating within the constructs of its bylaws, as well as any applicable local or state laws or regulations. Bylaws provide the framework for club operations and help ensure that the club runs well and avoids legal issues. We recommend that club leaders use the following guidelines:

- Be well informed.
- Attend meetings and review information.
- Ask questions and rely on expert advice.
- Register dissent in writing.
- Practice good, transparent governance operating under the club's bylaws.

Additionally, clubs should disclose any potential conflicts of interest and record the disclosure. Please contact your staff liaison to discuss any challenges, issues, and/or concerns involving the club.

IV. Membership and Revenue

A viable alumni base is critical to the success of your club. It is essential for the club to identify, retain, and increase membership. Here are some recommendations to achieve this:

- Provide value to members.
- Send out an annual email to non-members or expired members to promote the benefits of membership. Offer “members-only” access to certain club services, like the membership directory or a job board.
- Charge different prices for member and non-member tickets for events.
- Reach out to relevant regional or affinity student groups on campus.
- Once the club reaches an appropriate size, consider instituting a tiered membership structure with different levels of access to services and benefits according to membership type.
- Focus on attracting new graduates by:
 - Offering free or reduced-cost membership to recent graduates.
 - Considering hosting a welcome event for recent graduates and summer interns in your region. Your staff liaison will provide a list of new alumni in your region or affinity following graduation each year.
 - Recruiting a recent graduate to spearhead a young alumni committee and hold young alumni specific events.
 - Utilizing social media, specifically LinkedIn and Facebook, to reach out to young alumni in your region or affinity. Your staff liaison can provide best practices on how to target this group on social media.

Dues

It is recommended that all clubs charge dues, but the cost of membership is up to the discretion of the club officers. Each club should analyze its programs and services and the associated expenses to develop a dues structure that best meets the club’s needs.

Many clubs implement a tiered dues structure. We recommend offering free membership to new alumni, and a reduced rate for young alumni and renewing members. This has been successful for the majority of our clubs in attracting graduating alumni during this critical period for engagement. Patron/sponsor members may be charged a significantly higher rate to show an extra level of support for the club; specific benefits may be assigned to those who contribute at this leadership level. Contact your staff liaison for suggestions on a tiered membership and dues structure.

Corporate Sponsors

Due to the strength of the Wharton brand, companies are often eager to establish a relationship with clubs in order to gain exposure to the club's membership. Corporate sponsorships are an excellent way to generate revenue, whether via direct financial support or in-kind donations, such as free printing, underwritten mailings, use of meeting space, or sponsorship of receptions and events. In the United States, sponsorship in the form of direct financial support to a 501(c)(3) or 501(c)(7) is usually tax deductible for corporate donors. Be sure to check IRS guidelines at www.irs.gov to make sure your club is in accordance with government regulations when approaching firms for direct sponsorship.

Remember, all marketing and communications must be in adherence of Wharton Club branding standards and clearly indicate that the sponsorship is of the club and not the Wharton School or University of Pennsylvania.

V. Communications & Publications

All club communications should be created with these primary goals in mind:

- Publicize the club's programs and services.
- Build the club's reputation and recognition among potential members.
- Appropriately reflect and support Wharton's brand identity.

It is important to take the time to develop a marketing plan for club programming, asking questions like:

- Who is our audience?
- What is the value we are offering?
- What information is essential?

Your staff liaison can guide you in drafting simple and effective messaging.

Club leaders should utilize the following tools:

1. Wharton Alumni Logo/Wharton Club® Name

Detailed information about the appropriate and authorized use of the Wharton alumni logo and Wharton Club® name and trademark can be found on pages 9-10. Your staff liaison can provide logo files for stationery and PowerPoint templates. We can also provide information for ordering podium and wall banners and other branded merchandise for use at club functions.

The Wharton/Penn logo is designed as a seal of uniformity; the shield and “University of Pennsylvania” tag line MAY NOT be separated. Clubs must use the Wharton alumni logo with the Penn shield/Wharton alumni name on all websites, banners, letterhead, and other materials. Your staff liaison can create a customized version of the Wharton alumni logo for your club. Please contact us to initiate this request.

2. Email and Print Mail Procedures

It is essential to judiciously plan an email strategy to avoid email overload. Communication should be coordinated with website content and print mail. Some specifics to consider for mailings include timing (intervals and frequency) and opt-in/opt-out links or response cards. Never send an email that shows recipients’ email addresses (utilize the **bcc:** line) and always use a consistent “From” address for messaging members. If you are using the School’s enterprise platform, use the email tool provided by the website. For frequency and format best practices, contact your staff liaison.

3. Newsletters

A great way to create awareness of your club and connect with your members on an ongoing basis is to send a regular newsletter. Newsletters are an excellent tool to highlight upcoming events, feature volunteers, and share club news. Contact your staff liaison for best practices on content, frequency, and formatting, or to see newsletters sent by other Wharton clubs.

4. Survey

It is important to get input from your membership base on club priorities and programming. Surveys should be short and allow users the option to fill out anonymously or include contact information for follow up. Questions should invite the respondents to comment on the club’s successes and areas for improvement, as well as ideas for future events. Your staff liaison can provide samples of effective post-event and general surveys used by other clubs.

5. Websites

A website is recommended for established clubs to communicate and provide resources to existing and potential members. Wharton provides a free website on our enterprise platform that allows clubs to post events, collect membership dues and event registrations, and send emails. It also connects the club's membership database to Wharton's alumni database for ease of sharing and exchanging information.

6. Social Media

Some clubs find using Facebook, LinkedIn, Twitter, and other sites can help publicize events and increase membership. These can be used instead of, or in addition to, a formal website. Contact your staff liaison for best practices and to help you get started using social media. Your staff liaison can advise you on your best option for social media depending on the level of engagement of your club, and our online engagement team can assist in the set up.

VI. Events and Programs

A club must offer distinctive reasons for members to join. Programs and events should be designed to reflect a balance of the following objectives:

- Professional development, education, and intellectual stimulation
- Networking, mentoring, and professional peer support
- Social interaction and entertainment

Tailor your events and programs to your membership base. Your staff liaison can help you analyze the demographics of your region or affinity or determine if a survey of your member base would help determine programming needs. Charging a higher non-member price can drive membership and significantly increase the event's revenue.

Events should be planned in advance to allow for adequate promotion and an appropriate variety. Emphasis should be placed on quality of events over quantity, and programs should provide value to attendees.

Events may fall under these categories:

1. Social

Social events, including happy hours, can be a good way for alumni to get to know one another in a relaxed setting. These events may be easier to plan and execute than other types of activities, and may appeal to young alumni or those new to a region. Ideas include:

- Cultural events
 - Guided museum tour
 - Theater tickets in conjunction with a talk by the producer, director, actors, etc.
- Sporting Events
 - Baseball
 - Golf
 - Tailgates
- Family Events
 - Summer BBQ/picnics
- Annual holiday party
- Community service
- Wine tasting or brewery tour
- Prospective student, accepted/current student, and young alumni welcome receptions (POP—Pub Outside of Penn)

2. Educational and Networking

Alumni often join Wharton clubs for networking and educational programming. It is important to provide your members with content that they would not be able to find elsewhere. What industries are common in your area? Is there a certain newsworthy topic? Ideas include:

- Industry panels relevant to location
- Investment/retirement planning seminars
- Economic outlook
- Quarterly speaker held over breakfast or lunch
- Monthly leads council
- Networking event for entrepreneurs
- Events specifically for alumnae
- Mentoring programs
- Evening networking/speed networking reception with cocktails

3. Faculty and Alumni Speakers

Events with faculty and alumni speakers are usually very popular and can drive membership. If you are interested in scheduling a Wharton professor to speak, please contact your staff liaison before reaching out on your own. Given the extensive commitments of Wharton faculty, we cannot guarantee that we will be able to meet all speaker requests, but we will work with you to best accommodate the request. In addition to faculty, alumni often want to hear from other alumni. Utilize your regional contacts and network. Locally, who do you know that would make a good speaker? Another alternative is to build an event around viewing a live or prerecorded presentation from the Wharton Webinar Series. Contact your staff liaison for special requests and to discuss alternatives to having a faculty speaker.

4. Career Management Services

Many clubs find that career management and development are a major area of interest for members. Whether actively searching for a job, thinking strategically about long-term career goals, or pursuing mentoring and support networks, many Wharton alumni recognize the value of educational and training opportunities as their professional careers evolve. Your staff liaison can work with your club and the offices of Undergraduate Career Services and MBA Career Management to tailor specific career programming to your region or affinity. Ideas for this type of programming include:

- Career guides, with regional or industry-oriented resources
- Peer counseling or mentoring groups
- Job boards—often a members-only password protected section on the club website
- Half- or full-day career management seminars
- Industry-specific networking events
- Job seekers meetings

5. Penn and Peer School Partnership

Wharton clubs are encouraged to make contact with their respective Penn club should one exist in the region or affinity. Clubs may also want to foster relationships and exchange information with the leaders of peer business school clubs, All Ivy groups, Ivy Plus groups, or local professional development organizations. The power of the combined club membership provides substantial leverage in attracting sponsorship and procuring speakers. Your staff liaison can help connect you with the other alumni groups in your region or affinity.

VI. Bylaws and Tax Status

To access a template that can be used to create or modify your Club's bylaws, and to learn more about obtaining tax-exempt status in the US, visit www.whartonofficers.com or contact your club liaison.

FULL WHARTON CLUB® LISTINGS

Jennifer Buchness

Domestic

Wharton Club of Boston
Wharton Club of Philadelphia
Wharton Club of DC
Wharton Club of New Jersey
Wharton Club of New York
Wharton Club of Northern California
Wharton Club of Rhode Island
Wharton Club of San Diego
Wharton Club Seattle
Wharton Club of Southern California

Asia

Penn and Wharton Club of Indonesia
Penn and Wharton Club of Malaysia
Penn and Wharton Club of the Philippines
Penn and Wharton Club of Singapore
Wharton Club of Hong Kong
Wharton Club of India
Wharton Club of Korea
Wharton Club of Japan
Penn and Wharton Club of Vietnam
Wharton Club of Australia/New Zealand
Wharton Club of Shanghai
Wharton Club of Taiwan
Wharton Club of Beijing
Wharton Club of Thailand
Wharton Club of Hong Delhi

Sarah Ryan

Europe, Middle East, and Africa

Penn and Wharton Club of the Netherlands
Wharton Club of Italy
Penn and Wharton Club of Turkey
Wharton Club of Paris
Wharton Club of Africa
Wharton Club of Russia
Wharton Club of Belgium
Wharton Club of Spain
Wharton Club of Germany/Austria
Wharton Club of Switzerland
Wharton Club of Greece
Wharton Club of the Middle East
Wharton Club of Israel
Wharton Club of the UK

Kelly Lauerson

Domestic

Penn and Wharton Club of Arizona
Wharton Club of Dallas
Penn and Wharton Club of Austin
Wharton Club of Greater Tampa Bay
Penn and Wharton Club of Central Florida
Wharton Club of Houston
Penn and Wharton Club of Michigan
Wharton Club of Minnesota
Wharton Club of Atlanta
Wharton Club of Northeast Ohio
Wharton Club of Charlotte
Wharton Club of South Florida
Wharton Club of Chicago
Wharton Club of St. Louis
Wharton Club of Colorado
Wharton Club of Western Pennsylvania

Latin America

Penn and Wharton Club of Argentina
Wharton Club of Chile
Penn and Wharton Club of Colombia
Wharton Club of Monterrey
Penn and Wharton Club of Mexico City
Wharton Club of Peru
Penn and Wharton Club of the DR
Wharton Club of Venezuela
Wharton Club of Brazil

Canada

Penn and Wharton Club of Toronto
Wharton Club of Quebec

Affinity

Lauder Institute Alumni Association
Wharton Energy Network
Out4Business - The Wharton LGBT Alumni Club
Wharton Follies
Pi Delta Epsilon
Wharton Healthcare Management Alumni Association
Wharton Aerospace Community
Wharton PE & VC Association
Wharton Black MBA Alumni Association

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For the full listing of Wharton Clubs® around the globe,
please visit www.wharton.upenn.edu/clubs.

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