The Harvard Alumni Association (HAA) and the Harvard College Fund (HCF) may assist student organizations with their record keeping of and communication to alumni constituents.

Record Keeping: Prevent lost or incomplete lists
When student organizations provide membership lists, we will work with the Alumni Records Office to have them coded in our database. Because regular updates take place during the year, your tags will then always include the most recent contact information for your alumni, along with permanent email addresses.

Student organizations can submit lists to the HAA/HCF (haa_collegealumniprograms@harvard.edu). Please submit lists in excel format, with as much information as possible, including the fields below in separate columns (if recorded). Within the sheet name, you should also include the name of your student organization. The more information that is provided, the quicker and more accurately the records can be processed. The standard time for tagging alumni is approximately 10 business days for lists under 100 members and 20 business days for larger lists.

<table>
<thead>
<tr>
<th>HUID</th>
<th>First Name</th>
<th>Last Name</th>
<th>Class Year</th>
<th>Email (@college or other)</th>
<th>Role</th>
<th>Other Information</th>
</tr>
</thead>
</table>

Communications: Connect with your alumni by mail or email
The HAA/HCF can assist student organizations that want to send out mail or email communications. If alumni of the student organization are already tagged in our database, the HAA can then send out communications on behalf of the student organization to members. If the student organization does not have data stored in the alumni database, they must first submit alumni information as described above.

All proposed outreach needs to first go through the Office of Student Life (Alex Miller, amiller1@fas.harvard.edu) for review and approval. If you are reaching out to alumni for a Club Sport, please be in contact with Harvard Club Sports (Jessica Perillo, jperillo@fas.harvard.edu).

Once approved, outreach messages should be submitted to the HAA (haa_collegealumniprograms@harvard.edu) for review, final approval, and distribution. Approvals from the Office of Student Life or Harvard Club Sports may still receive edits from the HAA depending on message complexity, format, and scope.

Paper Mailing
Low Quantity Mailings
For smaller mailings, students may come to the HAA offices at 124 Mount Auburn Street, 6th Floor to obtain mailing labels. All mailings must be assembled in and mailed from our office (due to our alumni privacy policy). The student organization must provide their own stamps, envelopes, and other materials—the HAA will only provide the labels with alumni contact information.

High Quantity Mailings
For larger mailings, students should use the Harvard Mail House. Before utilizing the Mail House, students must first contact the HAA for approval and then we will send alumni contacts lists directly to the Mail House to assemble mailings. Students will need to pay for all processing and mailing costs through the Harvard Mail House.
Email Messaging

The HAA offers broadcast email capabilities to student organizations. This section outlines the information needed in order to create and send your email and the guidelines that govern the process.

Benefits of HAA Email Marketing
Unlike email services like Outlook, Gmail, or Yahoo (which limit the number of recipients you can email at once and put your email at greater risk to be classified as SPAM), the HAA can send a message to hundreds of alumni at once. Your email will be delivered in a way that prevents the recipients from seeing who else has received the same email, not only keeping email information private, but avoiding ‘reply-all’ mistakes from occurring. The HAA’s HTML email platform allows you to send more than just text—your email can include one photo as well as links to external documents and websites, such as a class website or Facebook page. Most importantly, our email templates are designed to avoid being filtered as spam, ensuring delivery to as many recipients as possible.

Outreach Steps
Please coordinate outreach among your group and select one point-person to communicate with the HAA to provide edits and approve the messaging. This person should be on the leadership team, such as the secretary or president.

Timing
The process of creating, editing, testing, and proofreading your email takes time, so we ask that you reach out to us at least two weeks before you would like your emails sent. Once the required information is received, the HAA will build your email and submit it for your approval before sending it to all of the recipients.

Required Information
Please see the sample email on the following page for reference. Customized templates, including multiple images or other formats will not be accepted.

- **Recipients**: the population you’d like to receive the email (all alumni from Crimson Key Society)
- **Subject**: the subject line
  - 50 characters or fewer (“2015 Spring Newsletter” or “Attend our upcoming Reunion”)
- **From**: the sender(s)/signer(s) of the email
  - **Name** (“Mike Smith ’17, Crimson Key Alumni Outreach Coordinator”)
    - must include class year and title of sender
  - **Email address** (must be @harvard.edu address of individual or group name)
- **Reply-to Email Address**: this could be a personal email address or a group email address (“cleahy@college.harvard.edu” or “crimsonkeysociety@gmail.com”)
- **To**: Our email platform allows us to address the recipients by their first name at the beginning of the email. If you do not want it personalized this way, you may address a group (“Tom Smith” v. “Crimson Key Alumni”)
- **Preview line**: this short line appears at the very top of the email, and will also show up in the preview section on a mobile device; if the subject line is the email’s title, think of the preview line as the subtitle.
- **Customizable Group Name or Banner Image**: this text or image can be included at the top as a way to brand your messaging (“Crimson Key Society”)
- **Header**: this optional line appears at top of the email before the salutation or image (“Keystone | Spring 2015”)
- **Salutation**: address your recipients (“Dear [First Name]” or “Dear Members of the Crimson Key Community”)
- **Text**: the body of the email
- **Signature**: sender of email, which must also include class year and title of sender
- **Address of Group**: Physical mailing address of student organization

The HAA reserves the right to reject email content in accordance with University policies and best practices.
Sample Email

From: Caroline Leahy ’15, President (cleahy@college.harvard.edu)
Reply to: crimsonkeysociety@gmail.com
To: Crimson Key Alumni
Subject: 2015 Spring Newsletter

Read below for updates and to see a copy of our latest newsletter.

KEYSTONE | SPRING 2015

Dear Members of the Crimson Key Community,

Greetings from a very snowy Cambridge! I hope you have all enjoyed a healthy and productive start to the New Year. As the newly elected board assumes their roles and our 2015 Comp begins, I am excited to share with you some of Crimson Key’s most recent accomplishments. Catarina Martinez ’16 and Laura Ottinger ’16 organized another successful Freshmen Week and worked to expand our presence on social media (follow us on Instagram).

As always I want to thank all members, past and present, that help in maintaining Crimson Key’s continued success as a premier organization on campus. To the current membership, thank you for your energy and dedication to the Harvard community, and to all who have made donations to Key, thank you so much for your generosity. We could not continue to grow and thrive without all of your support!

You can read the latest edition of our newsletter, Keystone, here. Have a wonderful spring, and keep in touch!

Warmly,
Caroline Leahy ’15, President

Crimson Key Society
Box #34
Student Organization Center at Hilles
59 Shepard St.
Cambridge, MA 02138

Harvard Alumni Association
Harvard College Fund
Quick Reference Guide

Why should student organizations provide officer and membership information to the alumni office?

A closer relationship between student organizations and the HAA is mutually beneficial because:

- Students can keep track of alumni and can easily send out mail and email communications to their groups.
- Staff from across the University can keep track of alumni interests and student group affiliation.
- The HAA/HCF will use student organization membership to develop new programs and opportunities for both students and alumni to more easily locate, connect, and work with each other.
- Following graduation, students will be more aware of opportunities through the HAA (HAA Clubs, Shared Interest Groups—SIGs) and the HCF to stay connected to both the College and the alumni community by developing relationships with fellow alumni who share similar interests, goals, and passions (both professional and personal).
- Alumni in Shared Interest Groups (SIGs) will be able to provide leadership advice, resources, and assistance to similar student groups and organizations at the College.
- In return, these SIGs will establish contacts and have a better opportunity to increase membership by recruiting students as they transition into alumni life.

Student Organization Fundraising Rules & Guidelines

- Organizations must first receive permission from the Office of Student Life.
- If funds are being raised for a nonprofit organization, documentation of the tax-exempt status of the organization will be required.
- If you plan to contact other alumni, individuals, foundations, or corporations, the Office of Student Life will connect you with the Harvard College Fund (HCF) after meeting with your organization to review the plans.
- The HCF will schedule a time to meet with you to discuss your specific fundraising plans.

Checklist for Outreach

☐ Is your alumni list tagged and up-to-date?
☐ Have you connected with the Office of Student Life or Harvard Club Sports for discussion and approval?
☐ Do you have a simple message drafted, with only one image, basic text, a few links, a signer, and other content?
☐ If you are planning an event, do you have a registration page, detailed event timelines, and relevant information for pricing, accommodations, and who to contact in the case of questions or last-minute issues?
☐ Are you leaving enough time between the drafted message, the send, and the actual event or action?

Contact Information for Student Organizations Alumni Outreach

Record Keeping and Updating Lists

- Submitting Lists and Tagging Alumni—Harvard Alumni Association: haa_collegealumniprograms@harvard.edu

Initial Meeting and Communications Approval

- For student organizations—Office for Student Life: Dean Miller, amiller1@fas.harvard.edu
- For club sports—Harvard Club Sports: Jessica Perillo, jperillo@fas.harvard.edu

Sending Out Mail or Email Communications

- Please send all pre-approved communications to the HAA (haa_collegealumniprograms@harvard.edu).