Official Groups (Clubs): Initial Setup, Membership Plans

An official group (club):

- Is created by a Stanford alum who wishes to engage other alums with a common interest or in the same region
- Can only be created by contacting Alumni Communities Staff at the Stanford Alumni Association
- Must be chartered through the Stanford Alumni Association
- Is responsible for turning in club paperwork annually
- Has the capability to charge event fees or membership fees online
- Is covered by SAA Liability
- Can be regional (based in a specific location, i.e. "Stanford Club of Peoria" or global "Stanford Green Engineering Alums")
- Can be public, semi-private, or private (See glossary)
- Is accessible from www.stanfordalumni.org website
- Automatically updates member information
- Allows non-alumni (such as spouses or parents of current students) to join
- Allows volunteers to send messages to their membership using the Smartmail Lite tool

SAMPLE CLUB – admin view
INITIAL CLUB CREATION

Step 1:
If you would like to set up an official club, contact your SAA contact. If your request is approved, you will need to complete a Club Charter Form (glossary) sent to you by your SAA contact.

Once we've received your charter form, you need to decide if you will be charging dues through the system. If you are, let your SAA Contact know you’d like to set up online registration capabilities and complete the necessary ACH form (glossary) and mail it along with a voided check to:

Club Tool
SAA Alumni Communities
Frances C. Arrillaga Alumni Center
326 Galvez Street
Stanford, CA 94305-6105

Once we receive the forms, we will notify you to start set up. Note: an ACH form is ONLY necessary if your club collects membership dues or charges for events.

Step 2:
We highly recommend establishing a permanent @stanfordalumni.org e-mail address for your club. This will allow you to have a consistent e-mail address for your members despite yearly leadership changes. If you would like to establish a club stanfordalumni.org e-mail address, please contact your region manager.

Step 3:
Let your regional manager know who is the official club president. Different levels of access will be granted to club presidents, secretaries, treasurers, event managers, webmasters, membership chairs, and general board members. For a complete list of who will receive access to different parts of your website, see page 17. Once your site is created, the club president will be able to add or remove site administrators at any time.

Step 4:
Let your regional manager know if the club should be public, private, or semi-private.

- **Public**: viewable to all, and anybody may join.
- **Semi-private**: viewable and searchable by all; the club administrator must approve requests to join.
- **Private**: cannot be searched for on the general site, and members can only join by invitation.

Step 5:
Once we have notified you that your club has been created, you may begin your site and membership module setup.

ONLINE TOOLS SETUP

Creating/Updating Your Official Club Site
*Note: for instructional purposes, a variety of different club screenshots will be displayed*

Log in to SAA using your username and password. Once logged in, enter the Groups section of the site, then click clicking the "My Groups" link on the left hand menu

Your new official club will be listed here(1), along with any alumni-created groups you may have created on your own.
To enter your club information and preferences, select "Manage Group" beside your new club.

You will be taken to the Admin Panel page.

**Admin Panel: Group Settings**

This page allows you to set up the basic information for your club and is the jumping-off point for setting up club membership plans as well. Starred fields are required.

**Initial Fields**

**Group Name:** the group name is set by the name you indicated on the Club Charter form. To change an official group name, contact your SAA contact.

**Group URL:** this creates the short URL for your club, in the format "pgnet.stanford.edu/goto/name." Once created, this name cannot be changed by the club, so please think your shortcut name through carefully.

**Group Email Address:** The main email for the club. Messages sent by the club will come from this email address.

**Group Description:** The required group description should be short, engaging, and get your point across as to what your vision for the group is. This is displayed not only on your home page, but also as the blurb describing your group in the general Group page. Think of this as the "introduction" many alums will get to your club.

**Spotlight**

The spotlight section allows you to create a box of information at the top of your page that can serve to highlight
upcoming events, news, or anything you want your visitors to see immediately. The spotlight can be turned off, changed, or updated at any time.

To create, check the "add spotlight" box, create a title for your spotlight and fill in the text for your message.

![Spotlight Example](image)

**Group Settings**

The group settings help us categorize your club and make it easier for interested parties to find.

**Group Join Type:** Based on the join type you requested during initial set-up, this has already been set to “Public,” “Private,” or “Semi-private,” and cannot be changed from this site. Reach out to you SAA Contact if you need to change this setting.

**Group Categories:** Select your most applicable category from the drop-down menu. Alumni will be able to filter for your group category on the general Group page. You can select multiple categories. Based on your club affiliation, you can have multiple selections. For example, if your club were a diversity group and a young alumni group, you could select both "young alumni" and a diversity affiliation.
Show Group Members: this option makes the club group members visible to alumni visiting the club page, whether they are members of the group or not in private and semi-private group scenarios. Essentially, this toggle makes the group membership public to view. It will default as checked (i.e. viewable).

Important Notes:

- Member names are not visible to non-alumni who are not club members, even if they are signed into stanfordalumni.org. If a non-alum is a member of the club, they will see slightly edited information.
- Individual members have the ability to make their information viewable or not, apart from the group designation.

Region: This setting will determine whether your club is searchable by region in addition to the categories you selected above.

- Regional: A group is regional if it is tied to a map-able location (i.e. Chicago, Northern California, Europe).
- Global: A group is global if the interest is not tied to a particular area. "Stanford Alumni in Education" would be one example of this.

Group Location

A mailing address is required for all clubs. The club mapping capability, however, will only appear if your club is regional.

Zip/Postal Code (for regional clubs only): select a zip code to "map" your group to. This can be the location where most events may be held, or simply a centrally-located zip associated with your city.

How do zip codes work and why do they matter? Stanfordalumni.org now allows alums and visitors to search for local groups by city or zip code. Visitors will enter their own zip code and indicate the radius they would like to search within that zip code. For example, a person could search for any club within 25 miles of zip code 94305. If the group falls within that radius, it will be included in their search results.

Mailing Address - required: This will be stored in our records as your club's official mailing address, where correspondence may be sent. This does not have to coincide in any way with the map-able address. Some clubs use a volunteer's address to receive mail, others have set up a P.O. Box for club mail – such as mailed-in membership checks or registrations.
**Saving**

Once you are done with the steps above, you can "Make Live" and have your group become active on the SAA site, or "save as pending" if you’d like to review later before sharing your official group with the world. Be sure to check the content certification box.

Once you’ve saved, you can be done, or explore the optional Group Modules below.

**Your group will not be visible on the SAA page until you "Make Live."** If you keep it as pending you can find the club again by selecting "My Groups" from the Group homepage.

**Group Modules**

Optional group functionalities can be set here. The status can be set from Disabled (they will not show up on your group page) to Enabled by pressing the "edit" link. Each module will be described in more detail in the document, "Optional Module Setup."

When disabling and enabling modules, you will be taken to a different page, so please make sure to save your work first!
Admin Panel: Group Pages

Up to five additional “blank” pages are available for you to customize your group site. Use them to list board members, link to other sites, list past events, etc.

The Group Pages(1) tab is situated right beside the Group Settings tab.

Page Name: Name your page

Status: Set the status to "enable"

Page Content: The WYSIWYG (glossary) editor allows you to enter the content on your page without needing to know HTML.

When finished, you may save and preview your page.

Edit group pages: As you add more pages, they will be listed on the top section under the Group Pages heading, and you may edit them by selecting the "edit" link beside each one.
The membership module allows you to keep track of your group members, block members, message members, and assign members roles (to post to the blog, for example)

Membership setup can be accessed from the Admin Setup page, under its own tab, “Membership Plans,” next to the Group Pages tab.

The Membership Module does not become an active part of your site and is not viewable until at least one public (ie. not registrar only) membership plan is created. Once a membership plan is set up and people begin to sign up, your members can be accessed from the Membership link under the Group Links menu in your Overview page.

If you do not wish to use the membership capabilities at all, do not set up a membership plan.

Membership Plans

Official groups can create multiple membership plans. These plans can be paid, or free. If your club charges due and you plan to take online registration, you must have an ACH Form on file (See "Initial Setup" section of this document.)

Note: Once created, a plan cannot be deleted; it can only be "inactivated." Make sure to check any plans you create thoroughly before saving, to avoid creating unnecessary multiple plans.
Membership Year End Month: If you have an annual membership, this indicates the month when the membership year ends. All of your club’s membership plans have the same year end time. Setting the year end month to August, as above, means all current memberships become past membership on August 31st.

Membership Carry Over Period: This is the "grace" period built into your membership, and sets the number of months before your year end month when you may sign up for membership and be carried over into the next membership year.

For example, the year end month is set in August, and the carry over period is set for 6 months. This means that as of March, a person can sign up and their membership will not end on August 31 but be extended into the next full membership year. Thus, if someone signs up in February of 2010 with the year end being August 2010, their membership will actually not end until the next year: August 2011.

Creating a New Plan (Add a New Plan)

To create a membership plan, select the "Add New Plan" button to go to the plan creation page.

Plan Name: name of the membership plan, such as "general", "young alum," "staff", etc.

Qualifications: sets limitation as to who can sign up under that plan. The options offered are:
- Stanford Alumni only – only Stanford alumni may sign up under this membership
- Non-alumni only – only non-alums may sign up
- Both alumni and non-alums – allows anyone to sign up
- Engineering Alumni only – for school-specific clubs, Engineering graduate degree
- GSB Alumni only – for school-specific clubs, GSB graduate degree
- Law Alumni only – for school-specific clubs, Law graduate degree
- Medical Alumni only – for school-specific clubs, Medicine graduate degree
Type: determines how many people can be counted under one membership
- Individual – each person signs up for their own membership. If paid, each person must pay.
- Family – groups of people can sign up under one membership number. If paid, they are only charged for one membership.

Duration: how long the membership lasts.
- Annual – basic one year membership, based on Year End Date
- Lifetime – never ends unless the member or administrator chooses to cancel their membership
- Multi-year – set the number of years the membership lasts.

Price: For paid memberships, set the price here. Leave at 0 if free.

Emails Required: requires members to have an email in our system, or input a valid email, before completing the sign-up.

Display to public or registrar: If set to "registrar only," the general public cannot view this membership plan.

Short Description: succinct description of the plan if multiple plans are offered.

Press SAVE when finished and continue on to the confirmation email/page section.

**Confirmation**

A member gets two confirmations when their registration is successful: an in-screen confirmation, and an email confirmation.

**Confirmation Page Text:** when a sign-up is successful, a confirmation screen will appear. Fill in the text for this screen here. This is basic text – no html is accepted.

**Confirmation Email:** a confirmation will also be sent to the email they have on file with Stanford. Complete the text for this email here.

**Return Email Address:** this is usually the club email. This is the address posted on the confirmation email, and will also receive any bounce-back or undeliverable messages. This should generally be the club email address.

**Send a Test Email to:** preview the confirmation email by mailing it to yourself before saving.
Questions: New and Returning

You can add questions to the registration form to gauge interest in certain activities, find out if the new member is interested in volunteering, and so forth.

You may set different questions to show up for "new" members versus members who are renewing an existing membership. The process for both is the same.

Questions are shown sequentially in the order you create them. You may change the sequence by re-numbering. You can also make questions required during registration by checking the “Answer Required” box.

The first question, "Our club sends announcements via email...May we send you club announcements via email?" is a default, required question for all clubs. If a member declines emails, they will receive NO email communications from the club.

Note: Once created, a question cannot be deleted; it can only be "inactivated." Make sure to thoroughly proofread any questions you create before saving, to avoid creating unnecessary multiple questions.

The following page gives you the option to choose from several templatized questions. These templates cover the most commonly-asked questions. Read these carefully to save yourself some work – the question you plan to ask may have already been created for club use.
If none of these suit the group’s needs, continue on to "Create New Question".

**Question Creation**

You can either select from one of the pre defined questions listed below or you can create your own question by clicking on the "Create New Question" button.

### Question List

- Networking and reconnecting with fellow alumni
- Career/professional development (e.g., industry networking events, career panels, balancing career/family workshop)
- Mentoring an undergraduate or graduate student
- Cultural events (e.g., museums, theater, musical performances, film screenings)
- Social gatherings (e.g., wine tasting, sporting events, BBQs)
- Community volunteer activities (e.g., tutor, mentor, visit a local senior center, participate in a clean-up day)
- Educational events (e.g., faculty lectures, talks by prominent AP4 leaders)
- Family-oriented activities (e.g., toddler/preschooler playgroups, family picnics, excursions to the zoo, parks, or hands-on museums)

Please include my information in the club’s membership directory

You will normally be contacted about club events via preferred email (as defined by your profile). For some events, we may also reach out by phone or paper mailings. May we contact you via the following methods? (Please check all that apply)

- Home Phone

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**Registration Questions: Create a Question**

Please create the text of your new question in the box below. You will also need to enter a Report Description, which appears as an abbreviation for the question text on reports. Select the format of the answers to your question, and classify your question in one of three categories.

**Question:**

- Interested in any of the following

**Report Desc:**

- Venues

**Answer Format:**

- Multiple-choice numerical

**Question Type:**

- New Member

**Answers**

Add below all possible answers that should be displayed for the above question.

- Add New Answer Choice

**Choice Text:**

<table>
<thead>
<tr>
<th>Choice Text</th>
<th>Order</th>
<th>Default Selection</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Museum</td>
<td>1</td>
<td>Remove</td>
<td></td>
</tr>
<tr>
<td>Restaurant</td>
<td>2</td>
<td>Remove</td>
<td></td>
</tr>
<tr>
<td>Private Home</td>
<td>3</td>
<td>Remove</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** Once a question has been saved you will not be able to edit this question.

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**Question:** Enter the question you wish to ask.
**Report description:** a "tag" or word that describes your question so that it may be classified among other questions you have created.

**Answer Format:** How answers are to be displayed:
- Multiple choice: respondent is given a list of choices and can make multiple selections
- Single answer: respondent is given a list of choices and can only select one
- Drop down: respondent selects one choice from a drop-down menu
- Text Box: free-form text answers for an open-ended question

**Question Type:** Select whether the question is displayed only to new members, or both new and returning.

**Answer setup:** If you’ve selected “Text Box” under Answer Format, leave this blank. For any other answer format, press "Add New Answer Choice" to create an answer option for a multiple choice, single choice, or drop-down question. If you wish, you may set one of these as the default selection.
Several key tasks can be completed through the membership module: assigning volunteer roles, registrar functions, running membership reports, and emailing your membership.

**Note:** To learn more about SmartMail Lite and emailing your membership, refer to "Sending Emails through SmartMail Lite."

The membership page can be accessed from the right-hand menu in the Overview page. (1)

From here (2) select different tabs to see all your current members, blocked, past or lapsed members.
- Current – current members from all of your club’s membership plans appear here.
- Blocked – once a member, they are currently blocked from interacting with the club or receiving group messages.
- Past – a member whose membership has not been current for over 60 days.
- Lapsed – a membership that is expired, but remains "active" until the date is beyond 60 days of the membership end date.

You can easily find a specific member by searching for them within your membership.

You can also filter your membership based on group role (if they have been assigned one), join date, or membership type (for official clubs only.)
Specific Action

When you have located the group member you need, you have several action options.

- **Make Contact**: makes this member the Contact Person for your group and only shows up as an option for officers. Their contact information will be available for others to use as the main group contact. Most clubs assign this to the president, the membership chair, or the secretary.
- **Remove**: removes a person as a current member and makes them a cancelled member.
- **Blocked**: blocks the person from interacting with the club in any way and from receiving group communications.
- **Send message**: opens a message window to *only* message this person, as opposed to the entire group membership.
- **Role**: assigns a volunteer role to the member.

Roles

The group President is now able to assign other board members their roles and give them access to the web tools. Previously, only SAA was able to code official group volunteers with access; moving forward this responsibility will lie solely with the official president.

The role of President can still only be coded by SAA staff, so please contact your regional manager if the leadership of your official group changes.

Qualifications:

- **Only current club members can be assigned roles**. This is a change from the previous model, where board members did not have to be signed up as current club members.
- One person can be assigned to several roles, depending on the access they need to the site.
- To also get **event module access**, a person MUST be given the event planner role, in conjunction with whichever other roles he may already have.
Role Access Breakdown (what each role gives access to):

<table>
<thead>
<tr>
<th>Role</th>
<th>Group Set UP</th>
<th>Membership Management</th>
<th>Discussion Board Admin.</th>
<th>Content Pages</th>
<th>Event Setup</th>
<th>Send Smart Mail</th>
<th>Polls</th>
<th>Blogs</th>
<th>Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>President</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<td>Treasurer</td>
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<td>Secretary</td>
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<tr>
<td>Event Planner</td>
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<tr>
<td>Webmaster</td>
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<tr>
<td>Membership Chair</td>
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<tr>
<td>Blogger</td>
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<td>X</td>
</tr>
</tbody>
</table>

**Emailing the Membership Using SmartMail Lite**

Members can be emailed right from the Membership page by clicking the "Email These Members" button at the bottom of each Membership listing. In this way, you can quickly email Current, Past, or Lapsed members without having to run a report.

You can also access the entire membership, or different subsections of your group, through the reporting functions in the Dashboard.

To learn how to message your membership using SmartMail Lite, please refer to the SmartMail How-to document, "Sending Emails through SmartMail Lite."
Now that you've created your official club and completed your webpage, it's important to make it easy for alums to find your group! Groups are searchable from several sections of the website:

From Where I Live, alums can search for groups, events or alumni in a radius from a selected location. Your group zip code, which you entered in the group settings page, is very important as it is what determines where your club will pop up if an alum does this search:
Alternately, alums can search for clubs using keywords in Groups and Club page. The Search Groups function pulls from the **group name** and **group description**. However, to make your club even easier to find, you can **tag** your club with different keywords that an alum may be searching for.

In the search below, we have searched for Great Britain. Since the name of the club is the Stanford Club of Great Britain, the club has appeared. But notice the description does not mention England, London, UK, U.K., or any of the other search terms a common alum may use. If we were to search using just London, the club would not pop up.
But if we tag the club with these keywords, then alums who use these terms will get the Stanford Club of Great Britain in their results. Tags can be found in the right-hand corner of your club home page.

Use a variety of keywords when tagging your group. For example, where there are multiple clubs in a state, clubs can tag themselves with the state name. The Stanford Club of Houston may want to use the tag "TEXAS" in case someone is searching for all groups in Texas from the search field, instead of going to the Where I Live page.

Tagging markedly increases the chance of an alum finding your club.

If you wish to remove a tag, click on the "my tags" link, select the tag from the list you will be presented, and then press delete in the page that follows.