



# **Wharton Clubs:** DIALED IN

October 18, 2018

# Agenda



Wharton Updates



Roll Call



Presentations

# Wharton Updates

Kelly Lauersen

Senior Associate Director, Global Clubs

## Wharton Alumni Relations

### Global Clubs Team



Rose Laden  
Director of Alumni  
Relations, Engagement &  
Programming



Kelly Lauersen  
Senior Associate  
Director, Global  
Clubs



Julia Embody  
Associate Director,  
Global Clubs



Lauren Roberts  
Associate Director,  
Global Clubs



Jade Parker  
Associate Director,  
Global Clubs  
& Digital Engagement



Beth Dellipriscoli  
Administrative  
Coordinator, Global  
Clubs

- Global Clubs team is now fully staffed
  - Beth (Administrative Coordinator) joined in June
  - Lauren (Associate Director) joined in February
- The team spent several months strategically reassigning portfolios to staff liaisons for more individualized attention and support

## Opportunities to Connect



Global Clubs

- Goal to increase communication with our team and other clubs with these platforms
- Wharton Club Leaders Facebook – private group, share with leadership teams:  
<https://www.facebook.com/groups/whartonclubleaders>
  - Use group as resource to share photos, best practices and feedback
- More resources now available on Wharton Officers:  
<https://www.whartonofficers.com/>
  - Team revamped the site this summer to include more guides and how-to's, search bar, volunteer spotlights, and more
- Club leadership conference this year will be 4 regional gatherings
  - Record breaking conference last year in NYC with 39 club leaders from 13 countries
  - The goal of smaller conferences is to meet leaders where you are and address regional challenges
  - Locations will be San Francisco (TBD), Philadelphia (May), Shanghai Forum (March), London Forum (June)



- More than Ever ties into Power of Penn Campaign with fundraising and engagement goals
  - <https://giving.wharton.upenn.edu/>
  - Increased fundraising goal to \$1 Billion including single largest donation to Wharton ever
  - Join the newsletter to hear more about campaign and updates on the school
  - Ask your staff liaison how to get involved
- Regional focused events with Joe Talks
  - Tokyo (October 10)
  - Philadelphia (January 23)
  - Miami (February 6)
  - DC (April 30)
  - Sao Paulo (June 5)
  - NYC (TBD)
- Fast Chats
  - <https://alumni.wharton.upenn.edu/events/category/wharton-alumni-fast-chat/>
  - Online speed networking focused on chatting with other alumni on specific industry or topics
  - Each match lasts for a maximum of 10 minutes
  - Upcoming topics: Career Resources, Energy, Finance, Social Impact, Alumnae

# Roll Call



*When your name or phone number is read, please state your name and club affiliation.*

See attendance list for reference.

## Additional Notes



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Name of Initiative

- Important to note that these presentations will not solve all problems as membership is just one piece of a club
  - Most important is establishing leadership team and strong calendar of events
  - There is no one size fits all model
  - Questions to consider: What does membership mean? What is its value? Why charge membership dues? How are you communicating back to base?
- Membership model should be constantly evolving
  - Trends for young people lean towards pay as you go
  - Monthly memberships may be more appealing
  - Recent grads are busy and not sure if they will see benefit from going to events
- NationBuilder auto renewal still not available but we are working on it

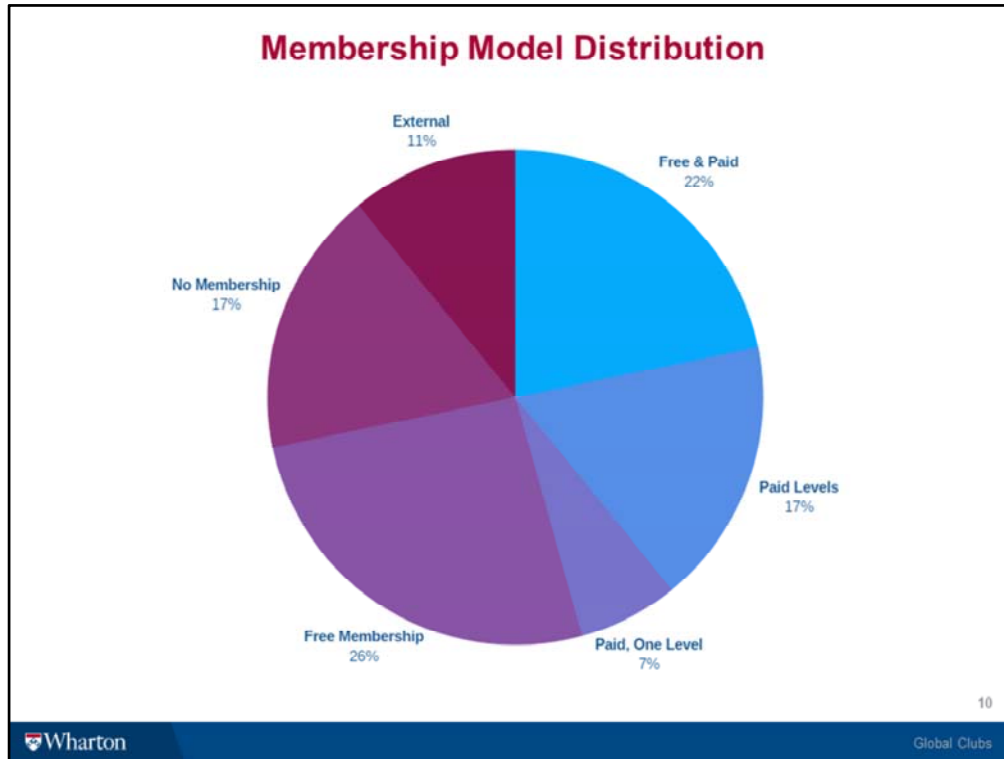


# Membership Models

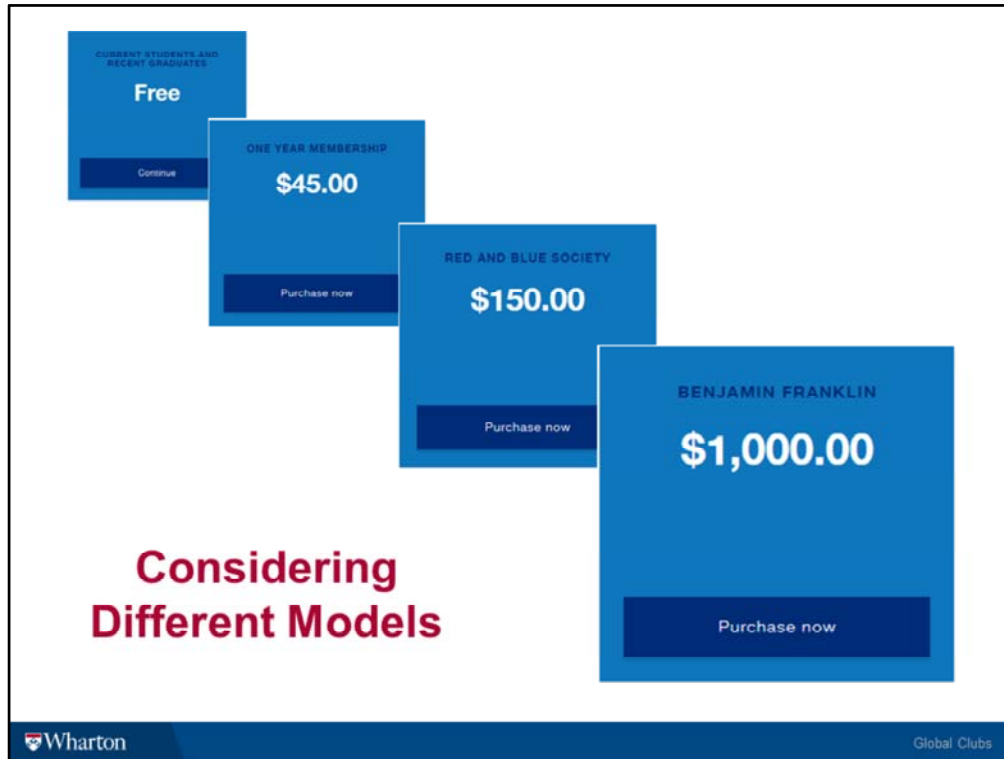
Jade Parker

Associate Director, Global Clubs & Digital Engagement

- Critical question regarding membership – who can be a member?
  - Open to all Wharton alumni who have completed degree granting programs and a select number of Executive Education programs
  - For clubs on the NationBuilder platform, we offer you a database of Wharton alumni who are either local or who have identified as part of your affinity
  - Involvement of Penn alumni is at the club's discretion but we do not offer lists of Penn alumni unless you are a joint Penn and Wharton club
  - Some clubs offer non-alumni, affiliate memberships
  - Reach out to your liaison with questions regarding alumni status
- Membership rules should be stated explicitly in bylaws



- Clubs define membership in different ways
  - Data provided is from 46 clubs on NationBuilder platform
  - Many clubs on the platform have a paid membership structure
  - Paid structures are tiered so that club benefits increase as you pay more dues
- Club data breakdown:
  - 10 clubs offer free and paid levels
    - This model often offers free memberships for current students and recent graduates
  - 8 clubs offer paid tiers
    - Cheaper memberships to young alumni and a similar variety of membership levels
  - 3 clubs offer uniform cost system
    - One level of paid membership in which all members pay the same price
  - 12 clubs forego paid membership and offer free memberships
    - Club can get an indication of the number of people who are most interested in engaging
  - 8 clubs do not offer any membership
    - Generate revenue in other ways (fundraising, corporate sponsor)
  - 5 clubs handle membership externally to their website



- Depending on culture and community, a tiered model offering a combination of both free and paid models may be most beneficial
  - Tiered model is the highest percentage of membership models on average
  - We encourage offering free membership to recent graduates
- Think about where funding is coming from – if not from paid memberships, consider clubs financial needs and community to reach goals
- Paid membership data:
  - \$40-\$5,000 range of the clubs on NationBuilder who charge membership dues
  - Standard annual fee: \$50-75
  - Keep in mind that very few constituents are purchasing at the highest level of membership
  - Personal membership upper threshold is about \$150
  - After \$150, membership usually drops to single digits at highest levels
  - \$500 seems to be another cutoff for constituents purchasing memberships at the highest levels



# Membership Benefits

Julia Embody

Associate Director, Global Clubs

- Models are the “what” of membership, benefits are the “why”

## Membership Benefits

- Crucial for both paid **and** unpaid membership models
- Create a value proposition for
  - Spending money on a membership fee
  - Devoting time to attend events
  - Identifying with the club
- Part of developing a unique identity for the club

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- Benefits of membership are crucial to consider for any model
- Benefits offer a value proposition for spending money and time as a member and show what is earned from associating with the club
- Important step in establishing unique identity for the club



- Important to scale these 4 themes and combine based on region and goals
  - Communications
    - Low cost way to add value and identify engaged alumni especially for a club who is just getting started
  - Leadership
    - Only members can vote to elect leaders
    - All leaders must be members of the club
  - Discounts
    - The most common benefit that encourages time engagement and financial support
    - Best suited to combination paid and unpaid model to create differentiation
    - Requires strong calendar of events
  - Special access
    - Allows club to be creative in its offerings
    - Creates more incentives to support club financially and is best suited to paid model

## Membership Benefits



### Communications

#### *Wharton Club of Brazil*

Active Instagram account features  
video highlights from events

Unpaid model

#### *Wharton Club of Northern California*

Website features alumni job and  
housing opportunities

Paid model

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- A few examples of clubs with successful communication strategies:
  - Brazil
    - Unpaid model where all are automatically considered members
    - Very active social media presence which allows alumni to experience what club has to offer and feel included even when not there
  - Northern California
    - Paid membership model
    - Offer job and housing opportunities which are only available for those who are paid and signed into the website

## Membership Benefits



### Leadership

#### *Penn & Wharton Club of Mexico*

All alumni are eligible to vote in elections without paying membership fees

Unpaid model

#### *Wharton Club of Paris*

Board members must be paid members and only paid members may vote to ratify the leadership team

Paid model

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A few examples of clubs with successful leadership benefits:

- Mexico
  - Unpaid model
  - Club sends out elections via survey to everyone
  - Great way for people to feel included in process and in the direction of the club
- Paris
  - Paid model
  - All board members and those who wish to vote need to pay to be a part of elections



## Membership Benefits



### Discounts

*Wharton Club of Atlanta*

Members may attend events for free or at steeply discounted rates

Paid model

*Wharton Club of New Jersey & Wharton Health Care Management Alumni Association*

Members may select a dual-membership discount for access to programs from both clubs

Paid & unpaid model

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- As noted, discounts are very popular way to offer membership benefits and allow paid members to enjoy events at a special rate
- An interesting way to use the discount benefit without necessarily pricing event tickets differently is to offer a dual membership with an affinity group in your region

## Membership Benefits



### Special Access

#### *Wharton Club of Boston*

The Wharton Alumni Angel Network in Boston is open only to members of the Wharton Club of Boston for an additional fee

Paid model

#### *Wharton Club of Chicago*

Only paid members are eligible to participate in the club's mentor matching program

Paid model

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- This membership benefit offers a creative outlet for clubs to think about what membership can mean
- Alumni Angel membership – membership benefit add-on
- Special access options add to experience, more than just discounts
- Examples of clubs with successful special access benefits:
  - Boston
    - The Wharton Alumni Angel Network
      - functions as a group within the club
      - only open to members who also purchase a Wharton Club of Boston regional membership
      - similar to a membership benefit add-on
  - Chicago
    - Club offers a mentorship match program for which only paid members are eligible
    - Adds more value to member's experience than just saving money on events

# Membership Benefits

## Questions to Consider

### UNPAID MODEL

- How does the club identify highly engaged members?
- What value do alumni get from attending an event or following updates from the club?
- How do program offerings reflect the mission or identity of the club?

### PAID MODEL

- How important are membership dues to the financial health of the club?
- Is the cost of membership commensurate with the value of benefits?
- What special access programs might be impactful for paid members?

- These questions provide a way to explore what the purpose might be behind your club's membership model
- It's a great exercise to think critically about this aspect of your club and separate out the value that you're offering through membership



# Marketing Membership

Lauren Roberts

Associate Director, Global Clubs

- Marketing is the “how” of membership

## Marketing Membership

1. Define

2. Incentivize

3. Thank

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- Define the culture - what it means to be a part of the club
- Takes time to create a culture of membership
  - Culture also depends on region so try different strategies to determine what will work for your region
- Support membership from the top down
  - Club leaders should be visible, gather feedback
  - More personal connections with board, more people see value of club
- Plan creative ways to inspire new members to join
- Thank those who join in a meaningful way

Define



*Wharton Club of New York*  
 Free membership for all alumni but encourage joining at higher level through culture of "Take the Call" and "Make the Call"  
 Paid & Unpaid Model

*Wharton Club of Brazil*  
 No membership dues but ask for donations to support the robust calendar of events  
 Unpaid Model

What does it mean to be a member of your club?

Wharton

Global Clubs

- Culture of membership should be handled from the top down, be visible and learn what members want
- More personal connections allow members to feel included within the club
- Clubs successfully defining culture:
  - NYC
    - "Take the Call, Make the Call" to connect people
    - Value is access to all other Wharton alumni in NYC
    - Paid memberships build on idea of community and access
  - Brazil
    - No membership fees but encourages alumni to donate and support the club by offering robust calendar of events
    - Packed calendar and replication of nostalgic student events help to pull alumni in
    - Think about traditions that alumni enjoyed as students and how they can be repurposed

## Incentivize

### Create Easy Opportunities to Join

#### *Penn & Wharton Club of Arizona*

Free entry to sold-out Fall Kickoff for anyone who purchased membership before the event

Paid Model

#### *Wharton Club of Houston*

Included link to become a member on holiday party registration, highlighting annual membership is better value than non-member ticket price

Paid Model

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- Joining club should be easy and financially beneficial
- Create an ongoing member recruitment strategy for significant events
- Key is to connect with new members early and add value to membership throughout year

## Thank

### Incorporate Recognition in All Programming



#### *Wharton Club of Japan*

Recognizes members at events  
by adding ribbons to nametags

Paid Model



#### *Wharton Club of Italy*

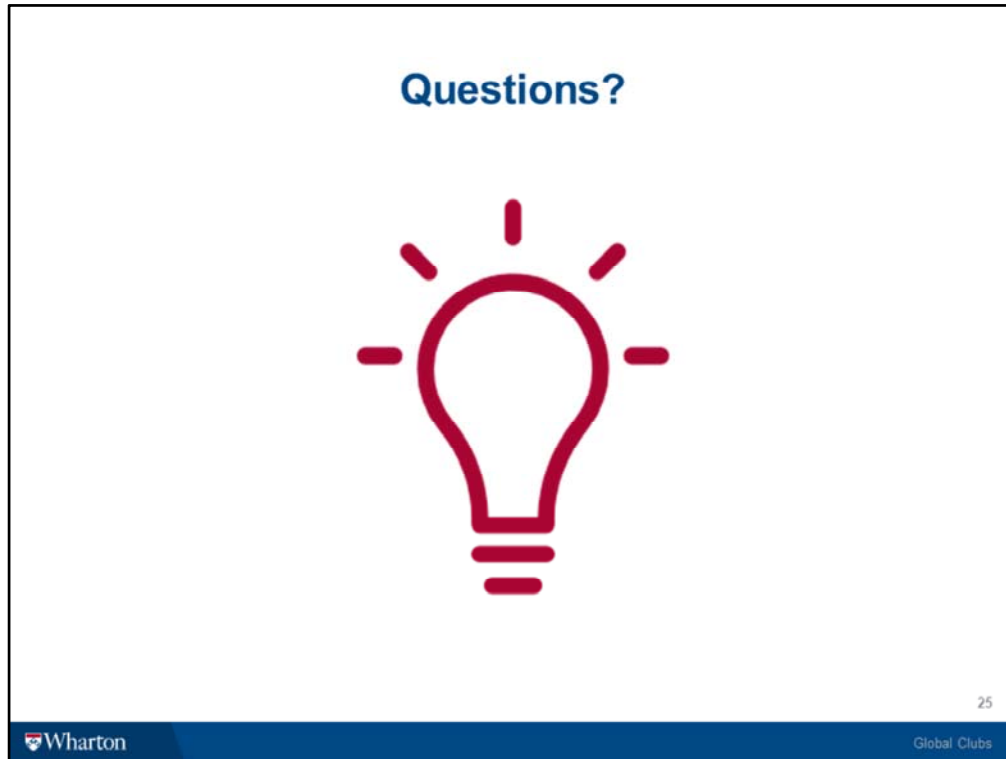
Meetings between President  
and key members to brainstorm  
ideas for future events and  
programs

Unpaid Model

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- Think outside the box about what makes sense for your club community
- Members should feel valued and excited about renewing membership





- Is it possible to get professors in different places? Way for them to interact with clubs?
  - #1 question from club leaders
  - Top priority is to track faculty travel for increased faculty and club events
  - Slow and steady, but making progress
- Is there an opportunity to see other clubs when traveling? Something in place to meet other clubs?
  - Global Clubs calendar pulls in events from NationBuilder:  
<http://www.whartonclubscalendar.org/>
    - Events can be added manually, contact your staff liaison
  - Working on a strategy for how to share with more alumni
  - Let us know if any suggestions for improvement
- Is member pricing extended to other Wharton Club members?
  - Up to individual clubs, but something we certainly encourage
  - We can send out a survey to club leaders to see if this is something that they would be interested in
- What are the best ways to communicate and share what we're doing?

- Wharton Club Leaders Facebook group (<https://www.facebook.com/groups/whartonclubleaders/>) would be great resource to continue this conversation
- What are the best events for getting new members? Most effective for boosting membership?
  - Best to think of unique events that will help drive membership
  - Holiday parties and annual events are popular because it is a social and festive time
  - Events that offer food, beverage, and alcohol are a particular draw
  - Events that serve as membership appreciation and double as membership drive are often a success
    - Dallas-Ft. Worth hosts an annual gala in January usually at the house of an alumnus
  - Official founding dates can also be a fun programming idea to rally behind
  - Themed events around career management and hosted seminars with limited attendance can be highly interactive
    - Chicago hosted 3 events like this where Chris Nadherny, WG'79 was a speaker. Great show of leadership and experience
- What are special ways that you thank members?
  - Dallas-Ft. Worth has "member" printed on name badges
  - Japan adds club leader ribbons to name badges which are a great talking point
- What is the Wharton Alumni Angel Network?
  - <http://www.whartonangelnetwork.co/>
  - The Wharton Alumni Angel Network in Boston is a subgroup of the regional club
    - Club works to provide infrastructure
    - There are a few events related to angel investing throughout the year that are free to members
    - Connecting entrepreneurs to angel investors is very popular
- Are there any incentives that have worked well or attracted members?
  - New Jersey hosted a game night for people to attend, mingle, and enjoy games

- Great turnout of people who were not members
- New Jersey is also organizing a night at the New Jersey astronomical association
- Opportunities to provide interaction and way to network without a particular speaker
- New Jersey does an annual event survey which helps them gather a lot of valuable information, hear about event ideas, and invite survey takers to give more ideas



# Wharton Clubs: DIALED IN

**Thank you for joining us!**

Stay tuned for more information on accessing  
notes, attendee contact information, and a  
recording of this call.