

Reunion Budgeting Process and Best Practices

Budgeting Overview

The Reunion Committee Chairs and Reunion Treasurer will work with their HAA staff liaison to create a reunion program that is as inclusive and accessible as possible with regard to the cost of events.

The Harvard Alumni Association (HAA) will host free virtual events for all reunion classes throughout the year. Generally, class-based virtual events are free, but if there are events that incur costs, the Reunion Committee Chairs and Treasurer can choose to use class funds to cover these expenses. For example, costs might arise from hiring a performer or creating a multimedia piece. Initially, consider whether someone within your committee or class might volunteer their talents before engaging external parties. If your class organizes regional in-person gatherings throughout the year, a common approach is for these to be “pay-as-you-go” for the attendees, meaning that there is no fee to set up or attend the event, but if food or drink is available, and they choose to buy it, that would be the responsibility of that individual. There is no budget from the HAA to underwrite or sponsor regional events.

Planning the Reunion Budget

The spring in-person programming will require payment to attend, and your HAA staff liaison and other colleagues in Alumni Affairs & Development will work with the Reunion Committee Chairs and Reunion Treasurer to create a budget based on your plans.

The HAA and Alumni Affairs & Development have developed a budget tool designed to enhance financial transparency for volunteers and reduce risk to the class. All budgets are now finalized and approved by the AA&D Finance team to ensure accuracy. These budgets are prepared at cost and include a small contingency. However, this contingency should not be relied upon for unforeseen expenses after the budget has been finalized.

Before launching the reunion registration form for in-person campus events, the HAA requires written approval of the reunion budget and pricing from the treasurer(s). If any additional items are added to the budget after the initial approval, the treasurer(s) must provide written consent. After the reunion year, if the class has a surplus, the treasurer(s) will receive a check. Conversely, if the class incurs a deficit, the treasurer(s) will need to reimburse the HAA from the class treasury.

Registration Fee Components

As part of the costs of the in-person programming, all alumni will be charged a registration fee. This fee will include up to three components, as outlined below, but will be listed as a singular fee on the registration form.

- **Flat Hospitality Charge:** This is a fixed amount per group to enhance the experience at headquarters. It covers costs such as coffee, water, and reunion supplies.
- **Variable Cost for Class Favor and Printing/Mailing:** This amount will vary based on the cost of your class favor and any printing or mailing expenses the class incurs.
- **Variable Cost for Financial Assistance:** This optional amount will depend on whether the class chooses to add a small charge to create a fund for classmates in need of financial assistance.

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Please note that this fee is **non-refundable**, except in extreme circumstances. Making this non-refundable protects class treasuries from financial risk from variable costs based on attendance, especially regarding favors.

Who Pays for What?

Harvard subsidizes or underwrites many reunion expenses for all classes. The chart below details expenses subsidized by Harvard and expenses that are the class's responsibility.

University Subsidized Expenses	Class Covered Expenses
Space rentals (designated by HAA)	Space rentals chosen by Class (Harvard Art Museum, off-campus locations, etc.)
Equipment rentals (tents, tables, chairs, etc.)	Catering and alcohol
Facilities and custodial services	Entertainment (DJ, band, etc.)
Staffing and student labor	Flowers and décor
Housing subsidy	AV/Media services for panels/sessions
Children's Program subsidy	Favors
Class photo photographer	Memorial Services custom expenses (organist, minister, A/V, extra attendant for choir rehearsal)
Memorial Service standard expenses (space, first attendant, & admin fee)	Off-campus transportation and parking
Hotel shuttles for post-50 th reunion classes	Class-initiated mailings and custom printing
Campus shuttles and parking	Discretionary expenses (ex. tickets to events, POPS, museum visits, etc.)
Security and safety (EMS)	
Permits/licenses (liquor, entertainment, etc.)	

Making Purchases and Signing Contracts

The HAA staff liaison should be making all approved purchases for the reunion committee (i.e. members should not be making purchases with the intention of being reimbursed). To plan for purchases, the Reunion Committee Chairs and Reunion Treasurer should be in regular communication regarding planned expenses. These steps should be followed for any expenses:

- All contracts must be reviewed and approved in advance by the Harvard Alumni Affairs & Development Finance and Administration team to ensure University compliance. No contract should be signed by a volunteer or under a volunteer's name.
- Goods and services must be procured and approved by a member of the Harvard Alumni Affairs & Development organization to ensure University compliance.
- All expenses must also be approved by the reunion volunteer leaders and treasurer.
- Class members/leaders will not be reimbursed for any out-of-pocket expenses.

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Pricing Options

There are two types of pricing options for in-person programming. These are in addition to the flat fee, as applicable.

- **Full Package:** For classmates who are planning to attend every in-person reunion event, the full package is a slightly better value than paying for each event individually.
- **A La Carte:** This option is for classmates who are only able to attend select in-person reunion events. Due to the nature of the programming, evening events are more expensive than daytime events.

In addition to the flat fee and programming expenses, classes with the option to live in campus housing will pay a housing fee per night (housing costs are per each person for adults, not per room). This is separate from your reunion budget and does not impact your class funds. That said, it is worth being mindful of these expenses when planning the budget for your class's programming.

Pricing Tiers

There are also typically three tiers of pricing. This encourages classmates to sign up early, which allows your committee and the HAA to better plan for the expected number of attendees and ensure spaces and meals can best accommodate your class. Pricing for each adult guest will be the same as the pricing for classmates.

- **Early Bird Pricing:** For planning purposes, it is most beneficial that your classmates register early. To encourage this, early registrants will receive the most affordable price. Early bird pricing is at cost and an early bird full package is at cost without contingency. Classmates will not pay a price for any event below its cost. Early bird pricing will end by a specific common date, regardless of registration launch date.
- **Standard:** Classmates who register after the early bird window but before the form closes will receive regular pricing, which is more expensive than early-bird pricing (roughly \$20 more per event or group of events on average over early bird pricing) but still a significant discount from walk-in pricing.
- **Onsite:** Inevitably, there will be walk-in attendees to reunion events. While this is a fact of reunions, we are making efforts to limit the number of walk-ins, as they make planning difficult for our catering partners, events teams, and impact staffing needs. Pricing will be roughly \$20 more per event or group of events on average over standard pricing.

Budget Creation Process

Once all the expected expense amounts are known, the reunion leaders will work with the HAA staff liaison and Alumni Affairs & Development Finance to create the budget and pricing before registration launches.

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The first phase involves reviewing menus, finalizing program components, and finalizing a budget worksheet with any other quotes. Meals (catering and bar) make up most of the expenses for reunions, so obtaining contracts for all meals will be an essential first step. Your HAA staff liaison will work with the caterer to determine counts that might work best based on an average of past attendance for your class and for that reunion. Once all major contracts and budget items are known, your staff liaison will then work with AA&D Finance to build out the budget.

The second phase involves the budget being drafted and approved by Finance. This can take up to two weeks. The team reviews the program components, as detailed in the budget worksheet and historical fixed costs, to create the budget. The Finance team then reviews the budget before setting a pricing model and approving.

The third and final phase is budget approval by the committee. First the Chairs and Treasurer will review the proposed budget and pricing and raise any questions to Finance. Pending this, the Chairs and Treasurer will then approve the budget.

Once the budget is approved, your HAA staff liaison will then begin working with other colleagues in AA&D to build the registration form for your in-person programming. **Once the registration form build is in process (and especially once registration has been launched), it will not be possible to change pricing further.** With that in mind, the reunion committee should avoid making any additional major expenses not captured in the budget planning, unless these are expenses that the treasurer has approved the use of class treasury funds for.

Financial Assistance

Reunion Chairs and the Reunion Treasurer are required to decide how they want to offer financial assistance to classmates to lower the cost in attending the reunion. A pool of funds can be made available for this by charging all classmates a flat fee as part of the registration process and/or allotting a specific amount of class treasury funds, if available. Classes need to make some provision for financial assistance.

To ensure a frictionless and inclusive registration process for those seeking financial assistance, there will be a front-facing promo code for 50% or 100% off registration costs for alumni registrants only. Financial assistance typically does not apply to housing, childcare, or guests. Those needing additional, non-standard assistance can call the College Alumni Programs Office for help. Caregivers and aids can be registered at no cost to alumni by calling the College Alumni Programs Office. If your class has a cap on financial assistance, your staff liaison will monitor the use of financial assistance, and if needed, remove the option for alumni registrants. Additionally, financial assistance cannot be used to cover non-campus housing (hotels, independent arrangements, etc.) or their transportation to, from, and around Cambridge.

Reunion Subsidy Program

Reunion program and fundraising committees are deeply committed to strengthening and supporting their class communities and the financial priorities of the Faculty of Arts and Sciences.

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The goal of establishing a reunion subsidy is to raise spendable funds to offset some or all costs for alumni to register for and attend their **in-person reunions**. Subsidies are intended to promote accessibility and participation for all classmates. Subsidies cannot be used to expand standard reunion programming.

The decision and responsibility of whether to raise a subsidy lies with the class's reunion program planning committee.

- Should a class decide to raise a subsidy for the sole or partial purpose of defraying overall reunion costs, all gifts should be received by Harvard by **December 15, 2024**.
- Should a class decide to raise a subsidy only to provide financial aid to classmates, all gifts should be received by Harvard by **January 15, 2025**.

Reunion subsidy contributions are considered gifts to the University and receive tax, class, and University credit. Because they receive tax credit, they are not refundable.

A class-appointed subsidy chair will work in close coordination with their class's Harvard Alumni Association (HAA) and Harvard College Fund (HCF) liaisons, in partnership with the Harvard Alumni Affairs & Development (AA&D) Finance team.

Reunion Subsidy Requirements

- The class must appoint a subsidy chair
- The class treasurer must agree to join and transfer funds to the HAA Partnered Treasury Program by December 15, 2024
- The class must agree to the accounting and reconciliation protocols outlined by Harvard's AA&D Finance team
- All gifts must be paid full by the appropriate deadline (December 15 or January 15) based on the subsidy's intended use

Reunion Subsidy Chair Responsibilities

The decision and responsibility to launch and execute a reunion subsidy campaign lies with the reunion program committee and should be a volunteer-led effort.

- A designated member of the class must serve as the primary volunteer solicitor (aka "subsidy chair") and owner of this effort, which includes the following responsibilities:
 - Join the reunion program committee and provide regular updates to the committee (or to the HAA staff liaison if they cannot participate in committee meetings)
 - Work with the class HAA and HCF liaisons to review the list of potential contributors and subsidy messaging
 - As gifts are made, share donor names, and intended amounts with the HAA and HCF liaisons
 - When soliciting classmates, make clear that this is a separate effort from the reunion gift campaign and that subsidy gifts should be considered in addition to an individual's reunion gift to Harvard
 - Ensure all gifts are made and pledges fulfilled by the appropriate deadline (December 15 or January 15)

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- Many classes already have substantial funds in their class treasuries that could be used to mitigate reunion costs. This should be explored prior to the launch of a subsidy effort, to see if it is needed.
- Solicitation is targeted to class leadership (program and fundraising committees); it is not a class-wide or crowd-funding effort
- In select classes, there may be a small group of non-committee members who are solicited (the subsidy chair will work with their HAA and HCF officers to determine potential contributors beyond committee members)
- It is expected that any subsidy donors will make a commensurate gift to the Faculty of Arts and Sciences through the reunion gift campaign
- Except for very special circumstances, subsidy funds will only be allocated to classmates and only for their program costs. Subsidy funds are not intended to cover the cost of housing, childcare, guest attendance, or transportation to and from campus. Any decisions about exceptional allocations of funds will be made by the reunion manager, Program Committee co-chairs, and class treasurer.
- To minimize misallocation of subsidy funds:
 - Donors should be encouraged to make subsidy gifts as a standalone gift (i.e., not as part of a larger gift)
 - Donors should be encouraged not to make a subsidy gift through a DAF (donor-advised fund)
 - Donors should include the fund name/number in the online description/check memo, as well as their class year (Harvard Alumni Assoc Class Activities Fund (610-368081RG))

Subsidy Use

- The reunion subsidy will be used only to directly offset reunion expenses. Classes may offer one or both of the following:
 - Lower ticket prices for all—offset reunion program expenses thus reducing ticket costs for all classmates
 - Targeted assistance to classmates—funds are directed to only those classmates who request financial assistance to cover their ticket cost at 50% or 100%
 - Combination of the two

Timeline for 2025 Reunions

- **September/October 2024:** Class leaders determine participation in subsidy program and identify a subsidy chair
- **September/October 2024:** Subsidy chair meets with HAA and HCF liaisons to review role, guidelines, and timeline
- **September 2024 – December 2024:** Subsidy chair engages in peer outreach and provides monthly updates to HAA and HCF liaisons
- **December 15, 2024:** Deadline for the class treasury to move into the HAA Partnered Treasury Program (if not already participating)
- **December 15, 2024:** **Deadline for all gifts to be received for classes using the subsidy (partially or fully) to lower the overall cost for all attendees** (no pledges; cash in hand). Reunion registration cannot go live until the budget has been confirmed.
- **January 15, 2025:** **Deadline for all gifts to be received for classes using the subsidy for financial aid only** (no pledges, cash in hand).

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Reunions Budget Decisions for Program Committee Chairs and Reunion Treasurer

- Financial assistance
 - Will you coordinate a class subsidy?
 - If there is no subsidy, how will you account for financial assistance?
 - From class treasury funds (and if so, how much)
 - From registration fee
 - From both registration fee and class treasury funds
- Favors
 - Will you offer a favor to registrants?
 - How much will the favor cost per item?
 - What will the favor be?
 - Are favors per classmate only or per person (i.e. do guests get one too)?
- Catering
 - Are there meals when you'll offer beer and wine?
 - Are there meals when you'll offer a full bar?
 - Do you want a mimosa/Bloody Mary bar at brunch?
- Entertainment
 - Are you planning to have a DJ or band? If so, when?
 - Are you planning to have a photobooth or photographer? If so, when?
- Printing/Mailing
 - Do you plan to send a save-the-date postcard?
 - Do you anticipate other printing costs/printed projects?
- Programming
 - How many content sessions will you offer?
 - Will you need AV for these sessions? If so, which ones?
 - Will you need more elaborate AV for any sessions?
- Memorial service
 - If your service is in Memorial Church, will you need a rehearsal on a different day?
 - If your service is in Memorial Church, will you need the organist to play?
 - Will you need a member of the Memorial Church clergy to participate in your service?
 - Do you want a printed program?
 - If your service is not in Memorial Church, will you need AV support (beyond HAA-covered streaming/recording)?