



**Harvard  
Business  
School**

**Alumni Clubs &  
Associations**

## **HBS Clubs and Associations Operating Agreement**

HBS considers its Alumni Clubs and Associations (also referred to as “Clubs”) to be a critical part of what connects alumni with each other and with HBS. As an implicit component of its mission to promote the welfare of HBS and to establish a mutually beneficial relationship between the School and its alumni, HBS encourages such peer-to-peer interaction and, with the provisions delineated below, formally supports the existence of HBS Clubs.

The purpose of this document is to summarize the fundamental operating agreement under which HBS expects each Club to function. This is critically important to HBS, as each Club represents the School to its alumni constituents and is, therefore, expected to operate in a manner that is both consistent with and reinforcing of the HBS community values and brand. To this end, the Club agrees to ensure that participants recognize that programs and activities are sponsored and managed by the Club and not by HBS.

### **1. MISSION/PURPOSE OF HBS ALUMNI CLUBS AND ASSOCIATIONS**

The purpose of HBS Alumni Clubs and Associations is to advance the mutual welfare of Harvard Business School and its alumni. This is accomplished by working in cooperation with the School and HBS Alumni Relations by:

- 1.1 Providing opportunities for alumni to remain connected to the School and each other.
- 1.2 Encouraging life-long learning, intellectual enrichment, professional growth and social interaction through forums of continuing education and development.
- 1.3 Providing opportunities for alumni to meet and serve as advocates, helping to promote and elevate the stature of the School within the community through Club programming.
- 1.4 Attracting the world's most talented individuals to Harvard Business School.

### **2. HBS OVERSIGHT**

- 2.1 **Operating Agreement:** The Club is defined as officers, directors, board members, staff, contractors, councils, committees, and volunteers. The Club will remain in good standing provided it operates in accordance with the provisions stated herein. As such, the Club President is strongly encouraged to share this document with all club personnel.
  - 2.1.1 Any Club failing to comply with the Operating Agreement will be subject to review by HBS.
  - 2.1.2 HBS shall have the discretion at all times to delist Club and/or request the removal of a club officer or board member if, in the School’s judgment, such Club, officer or board member has committed a serious violation of the Club mission, has breached the spirit in which Clubs function, has been negligent in the management of the Club, has brought discredit to the reputation of the Club or the School, or has otherwise acted in ways

deemed by the School to be inappropriate.

- 2.2 **Brand:** The Club will adhere to the guidelines outlined in “Harvard University and HBS Logo/Trademark Guidelines” (Appendix B) and "HBS Partnership Guidelines" (Appendix C). Non-compliance with School and University policies may result in the Club's loss of the right to use the "Harvard" name.
- 2.2.1 If abbreviated, the Club must use the following convention for an acronym.
- 2.2.1.1 It must reference the full Club name.  
(i.e. HBS Healthcare Alumni Association = HBSHAA).
- 2.2.1.2 It must not include a hyphen, slash or space.  
(i.e. HBS HAA does not refer to a School-approved alumni Club).
- 2.2.2 The Club may only use School-approved logo(s), which can be requested from the HBS Clubs Team ([clubsteam@hbs.edu](mailto:clubsteam@hbs.edu)). They may not be altered or manipulated in any way, and no specialized design may be requested (Appendix D).
- 2.3 **Data Governance:** Maintaining the integrity, consistency and security of data, whether sourced by HBS or by the individual Club, is of the highest importance. All HBS alumni information is owned by HBS, appropriate use of which is dictated by all relevant agreements, including the following:
- 2.3.1 [HBS Privacy Policy](#).
- 2.3.2 [HBS Alumni Services Terms of Use](#).
- 2.3.3 Participation Guidelines and Policies for Use of HBS Clubs Technology Solution.
- 2.3.4 Non-Alumni Administrator Alumni Data Confidentiality Agreement, as appropriate.
- 2.3.5 Terms of Use for HBS Clubs Technology Solution, if not on the School platform.
- 2.3.6 Privacy Policy for HBS Clubs Technology Solution, if not on the School platform.
- 2.3.7 The Club will consider all alumni data as confidential information. This encompasses all biographical information including name, home/business address, telephone numbers, job title, personal and HBS email address.
- 2.3.8 The Club will protect data from theft and/or misuse with high security passwords, firewalls and other appropriate measures.
- 2.3.9 Alumni data will not be accessible by or distributed to any non-alumni except where the non-alum is a paid Club administrator who has signed the HBS Alumni Data Confidentiality Agreement. This must be counter-signed by the/a Club president. All signed documents must be submitted to, and on file with, the School.
- 2.3.10 The Club is responsible for ensuring compliance with relevant General Data Protection Regulation (GDPR).
- 2.4 **Confidentiality Policy:** Respecting the privacy of our alumni, personnel, members, staff, supplier personnel, volunteers and of the Club is itself is a basic value of HBS.
- 2.4.1 All records dealing with specific organizations and local partners should be treated as confidential. All club personnel are expected to return materials containing privileged or confidential information at the time of their separation from the Club and/or termination of their service.
- 2.4.2 Unauthorized disclosure of confidential or privileged information may result in termination of your affiliation with the Club, and possible other corrective action. This

policy is intended to protect you as well as the Club because in extreme cases, violations of this policy also may result in exposure to legal liability.

2.5 **Registration:** The Club President will submit an annual report on engagement and programming, along with a summary of group activities, and samples of any materials produced by the organization.

2.5.1 The Annual Registration will be distributed, electronically, to the Club following the end of the School's fiscal year.

2.5.2 The Club is required to complete the Annual Registration. If not provided for two (2) consecutive years, the School has the right to delist the club from the HBS-approved clubs network.

2.5.3 Each year after Annual Registration, the Club will review the provisions stated herein to align and not contradict with the individual Clubs bylaws.

2.5.3.1 For clubs with Special Interest Groups (SIGs), the Club President will work to safeguard compliance of Club SIGs with provisions stated herein.

### 3. ORGANIZATION AND GOVERNANCE

3.1 **Representation:** The Club will remain a separate and independent alumni club/organization.

3.1.1 The Club will refrain from representing itself as the Harvard Business School.

3.1.2 The Club will refrain from becoming a chapter of a non-HBS/Harvard organization.

3.2 **Bylaws:** Operate under the direction of a written set of bylaws that provides clear and appropriate operating procedures as to the governance of the Club. The bylaws will be available to all alumni and personnel engaging with the Club.

3.2.1 The Club will be established as a non-profit entity (US-based clubs) or the local equivalent (outside of the US) within six (6) months of founding.

3.2.1.1 If the Club wishes to change its legal entity status, the Club's board must vote to approve status change. If the Club does not have a formal board, Club leadership is to vote.

3.2.2 Clubs are responsible for abiding by local tax rules, regulations, and filings.

3.2.3 It is strongly encouraged the Club facilitates an annual declaration process to ensure compliance of the Club's bylaws each fiscal year.

#### 3.3 Club Leadership

3.3.1 **HBS Community Values:** As members of the HBS community, all members of Club leadership, including officers, board members, and volunteers, are expected to accept and abide by the following:

- Respect for the rights, differences, and dignity of others
- Honesty and integrity in dealing with all members of the community
- Accountability for personal behavior

3.3.2 **Statement of Values:** Participants in Club activities, whether personnel, member or guest, acknowledge and agree to embrace and advance core club values consistent with the following Statement of Values:

- Transparency in all activities and operations
- Accountability for professional behavior
- Responsible stewardship of resources
- Obligations to fiduciary duties and responsibilities
- Commitment to maintain the public trust

3.3.3 **Code of Conduct:** It is the intent that the Club strives to exhibit the highest ethical conduct. As a representative of the Club, all Club personnel shall:

- Act with personal and professional integrity
- Treat others equitably and respectfully in all aspects of their activities without regard to race, color, religion, creed, age, sex, national origin or ancestry, marital status, veteran status, sexual orientation, or status as a qualified disabled or handicapped individual
- Not engage in any form of discrimination, bullying, or harassment of any kind
- Avoid engaging in conduct that would undermine the public's trust or tarnish the reputation of Harvard Business School or the Club
- Respect the privacy of others and protect confidential information

### 3.3.4 **Club President**

- 3.3.4.1 The Club president will serve as the primary contact between the Club and the School, by way of the HBS Clubs Team.
- 3.3.4.2 For geographic-based organizations, the Club president(s) must reside in the region for at least six (6) months (can be nonconsecutive) out of the year.
- 3.3.4.3 In person or virtual attendance at a School organized regional leadership meeting (i.e. CLC, APCLM, or ECLM) is required. However, a current senior Club officer may serve as proxy.
- 3.3.4.4 Participation on regular Club Connections Calls is recommended.

### 3.3.5 **Club Officers**

- 3.3.5.1 All Club officers must be HBS alumni (as defined in Appendix A).
- 3.3.5.2 For geographic-based organizations, all Club officers must reside in the region for at least six (6) months (can be nonconsecutive) out of the year.
- 3.3.5.3 Club officer positions will be clearly defined and will include, at a minimum president, secretary, and treasurer. Additionally, there must be officers responsible for events/programs and technology.
- 3.3.5.4 An individual club officer can serve in more than one role, however there must be three (3) distinct persons overseeing the Club.

### 3.3.6 **Board of Directors**

- 3.3.6.1 Where appropriate, a board of directors will be established to oversee Club operations and officers. An alumni member of the board may also serve as a Club officer.

- 3.3.6.2 The Club's board of directors will be comprised of at least eighty percent HBS alumni; the remaining twenty percent may be members of the current Harvard community.
- 3.3.6.3 For geographic-based organizations, all board members must reside in the region for at least six (6) months (can be nonconsecutive) out of the year.
- 3.3.6.4 The board chair may create a club advisory council as a separate and distinct group of ex-officio and emeriti members to advise the board about Club activities. Such a council does not have a role in advising the School.

### 3.3.7 Elections

- 3.3.7.1 The Club will have a clear and impartial succession plan that includes appropriate nomination and election procedures.
- 3.3.7.2 All positions and roles will carry explicit term limits.

### 3.3.8 Club Employees/Staff: Club employees/staff must include at least one club officer on communications with the HBS Clubs Team.

### 3.3.9 Ethics/Conflicts of Interest: Operate in a professional/ethical manner that does not allow for the mixing of personal or professional business with Club activities or communications.

- 3.3.9.1 The Club will refrain from making financial investments in any enterprise or venture. No Club officers, board members, volunteers or members will use the Club name in making financial investments in any enterprise or venture.
- 3.3.9.2 No officers, board members or volunteers will benefit financially from involvement with the Club. Club communications will not contain "advertisements" for, or listings of, any businesses unless those businesses have a formal Club management-approved sponsorship agreement.
- 3.3.9.3 No Club officers, board members, volunteers, or members may use the Club as a platform to promote professional or personal interests that may perceive to compromise its fiduciary obligations or do not align with the Club's mission and goals.
- 3.3.9.4 The Club will not use membership and/or alumni data for commercial purposes (refer to *Data Governance*). This data is available for networking purposes only; the Club will include such disclaimer on all materials personal information is accessible (refer to *Communications*).
- 3.3.9.5 The Club will remain neutral on all political issues both inside and outside the HBS community, as dictated by Harvard University policy.

### 3.4 Financial Controls: Ensure financial controls are in place and that funds are managed in a prudent manner and consistent with the Club's mission.

- 3.4.1 The Club will establish checks and balances as it relates to the receipt and disbursement of Club funds, ensuring full audit of all transactions. The Club is strongly encouraged to adopt policies that require two signatures for transactions of specified types or dollar amounts.
- 3.4.2 Where there are significant financial assets, the Club will consider having an explicit investment policy for the management of such assets.

- 3.4.3 Any and all financial transactions will abide by “Ethics/Conflict of Interest.”
  - 3.4.4 The Club will establish routine and transparent reporting to Club members.
  - 3.4.5 The Club will not aim to engage in or profit from club-related activities that is not in accordance with its non-profit status.
- 3.5 **Insurance:** The Club is strongly encouraged to have appropriate coverage for Directors & Officers and General Liability insurance to protect alumni volunteers and paid staff in the event of accident/injury or impact related to its activities.
- 3.6 **Fundraising and Sponsorship:** Monies, whether direct financial support or in-kind donations, must not be taken in as a means to generate income, but rather to support the reduction of costs associated with club activities, events, and operations.
- 3.6.1 The Club will obtain written approval from the HBS Alumni Clubs & Associations Director at the School to conduct fundraising of any kind for purposes that overlap with the School’s priorities.
    - 3.6.1.1 It must be clearly stated that contributions made by individual HBS alumni will not be credited as giving to the School and are considered strictly as donations to the Club.
    - 3.6.1.2 Neither the School’s divisions nor its departments may be solicited for faculty participation, donated materials or funding. Any such requests must be directed through the HBS Clubs Team.
  - 3.6.2 The Club may raise monies to be directed toward funding scholarships and student fellowships to HBS programs.
  - 3.6.3 A foundation or fund established by a Club must have a separate set of bylaws that identify the terms and conditions of its activity including, but not limited to, the use of funds, organizational structure, governance, and oversight. The nonprofit tax status, mission, and goals of the foundation or fund must align with the Club.
    - 3.6.3.1 To be considered charitable, and therefore tax-deductible, the entity’s tax status must be a 501(c)3 or the international equivalent.
- 3.7 **Third Party Agreements:** HBS Clubs are NOT permitted to enter into any agreements with third parties seeking to provide products or services to HBS alumni. The School will not recognize such agreements and will not permit promotion of the relationships (Appendix C).

#### 4. CLUB ENGAGEMENT

- 4.1 **Communications:** The Club will provide clear and regular communications to its members, constituents and HBS, whether in print or electronic form.
  - 4.1.1 The Club is required to maintain a website and is responsible for procuring a domain name (e.g. URL) and committing to its persistent availability.
  - 4.1.2 The Club is required to provide a publicly accessible means of contacting a Club representative by email or phone.
  - 4.1.3 The Club must publicly list all current officers and board members.
  - 4.1.4 The Club will include the following terms of use in the footer for all attendee lists:  
*This list is intended for personal use only. Use beyond this stated purpose, whether for any commercial, private, public, or political purpose (including sale, solicitation, promotion,*

*market research, surveying, etc.), is strictly prohibited.*

4.1.5 Press releases must be first approved by the HBS Clubs Team. They may not include quotes from the School (e.g. Dean's Office, faculty, etc.) without express written permission.

4.2 **Program and Event Offerings:** The Club will follow the processes and guidelines set forth by the School.

4.2.1 The Club is required to hold two (2) events annually, which may include School-sponsored programs. If not fulfilled for two (2) consecutive years, the School has the right to delist the club from the HBS-approved clubs network.

4.2.2 The Club cannot create Chapters, but can establish region leads and program series.

4.2.3 **School-sponsored programs/events:** The School-sponsored programs include, but are not limited to, Global Networking Night (GNN), New Venture Competition (NVC), and Club Events with Faculty. In advance of an event, the Club will connect with the HBS Clubs Team to ensure the Club is following the correct procedures and submission deadlines.

4.2.3.1 Neither the School's divisions nor its departments may be directly solicited for faculty participation. Any such requests must be directed through the HBS Clubs Team. The Club may describe HBS faculty as such and use their full academic titles and published biographies.

4.2.4 **Club-sponsored programs/events:** The Club commits that it shall not state, suggest or create an impression that Club-sponsored events and programs are offered, sponsored, organized, accredited, or endorsed by Harvard University or HBS. To this end, only approved logos may be used, which must explicitly state the Club name in full or by recognizable acronym on all such materials (refer to *Brand*).

4.2.4.1 Any Club program that involves Minors must follow the [Harvard University Guidelines for Interacting with Minors](#).

4.2.5 **Awards and honors:** Any such recognition bestowed by the Club must be made clear that it is given by the Club, not HBS. This includes:

4.2.5.1 Language used to announce and/or publicize the event as well as logos used on plaques or other materials must fully state the Club name.

4.2.5.2 Presentation may not be made by School faculty or senior leadership.

4.2.6 **Pro Bono Consulting, Community Partners or Social Enterprise Initiatives:** Clubs engaging in such programming must designate an Officer as lead. It is at the discretion of the Club to require an additional membership fee to cover program expenses. Appropriate statements regarding release of liability in the event of adverse impact of recommendations should be secured in advance of work.

4.2.7 **Alumni Angels:** Clubs engaging in such activities must designate an Officer as lead. It is at the discretion of the Club to require an additional membership fee to cover program expenses.

4.2.7.1 In the event that the Club is a 501(c)3 organization (i.e. charitable), a new entity must be formed.

4.2.7.2 The Club may neither recommend nor invest in any individual or company.

4.2.7.3 Activities must provide equal balance between education on investing and individual opportunity to invest.

4.2.7.4 Participation must be limited, per SEC regulations, to accredited investors.

4.2.8 The Club will refrain from using any other versions of HBS or Harvard University names, brands, logos or insignia, campus photography or other images, or other HBS or Harvard University trademarks for any purpose in connection with Club-sponsored programs. The

Club agrees not to create materials that readers might consider confusingly similar to HBS or Harvard University materials (refer to *Brand*).

4.2.8.1 Photography, whether still or moving, may not include general images of HBS campus or buildings that do not include event participants, honorees or presenting faculty.

4.2.8.1.1 Proper release should be received from any individual or company that may be presented on a publicly available forum.

4.2.8.2 Press and media coverage are not permitted for club events held on the HBS campus.

4.2.9 Clubs are not allowed to create or offer teaching programs for the public, neither with HBS faculty or alumni as instructors, without prior authorization and written agreement with the HBS Clubs Team and School leadership.

4.3 **Membership:** Membership shall be open to all HBS alumni.

4.3.8 HBS alumni are identified as MBA and DBA graduates and participants of alumni-status Executive Education programs only (Appendix A).

4.3.9 The Club may choose to grant membership to constituents within the larger Harvard community, which may comprise no more than 20% of the Club’s total membership body.

4.3.9.1 The Harvard community includes: spouses/partners of HBS alumni, current HBS students and their spouses/partners, alumni of all other Harvard University Schools and their spouses/partners, current HBS and Harvard faculty, current HBS staff, HBS visiting fellows, HBS Advanced Leadership Fellows and Entrepreneurs-in-Residence.

4.3.10 The Club will not limit membership on the basis of race, ethnicity, gender, religion, sexual orientation, age, disability, financial position, accredited investor status or other discriminatory classifications.

4.3.11 At the discretion of the Club, individuals who do not meet membership requirements may still attend Club events.

**5. SIGNATURE**

I have read and agree to abide by the Operating Agreement and Appendices.

\_\_\_\_\_  
HBS Alumni Club & Association Name

\_\_\_\_\_  
President/Co-President Name

\_\_\_\_\_  
President/Co-President Signature

\_\_\_\_\_  
Date

I have read and agree to abide by the Operating Agreement and Appendices.

\_\_\_\_\_  
Other Co-President Name



\_\_\_\_\_  
Other Co-President Signature

\_\_\_\_\_  
Date

---

I have read and agree to abide by the Operating Agreement and Appendices.

\_\_\_\_\_  
Board of Director Chair Name (if the President is not the Board Chair)

\_\_\_\_\_  
Board of Director Chair Signature (if the President is not the Board Chair)

\_\_\_\_\_  
Date

## APPENDIX A

**HBS Alumni Status**

1. MBA or DBA awarded by HBS
2. Alumni status certificate awarded by HBS Executive Education program
3. One full year of study and research completed under direct and exclusive supervision of a member of the HBS faculty with confirmation from the Office of the Registrar

**I. CURRENT HBS PROGRAMS GRANTING ALUMNI STATUS**

- Master of Business Administration (MBA)
- Doctor of Business Administration (DBA)
- Advanced Management Program (AMP)
- General Management Program (GMP)
- Owner/President Management Program (OPM)
- Program for Leadership Development and completion of either PLD Module 5 or 10 days of HBS Executive Education open-enrollment/custom programs (PLDA)
- Joint Program: Harvard Kennedy School/Master of Business Administration (MPP/MBA and MBA-MPA/ID)
- Joint Program with Harvard Law School/Master of Business Administration (JD/MBA)
- Joint Program with Harvard Medical School/Master of Business Administration (MD/MBA)
- PhD in Business Economics (PHDBE)
- PhD in Information, Technology, and Management (PHDITM)
- PhD in Organizational Behavior (PHDOB)
- PhD in Science, Technology, and Management (PHDSTM)
- President's Program in Leadership (PPL)
- Senior Executive Leadership Program (SELP)
- Senior Executive Program China (SEPC)

**II. RETIRED HBS PROGRAMS WHICH GRANTED ALUMNI STATUS IN THE PAST**

- Advanced Management Program/International Senior Management Program (AMP/ISMP)
- Central and Eastern European Teachers' Program (ETP)
- Doctor of Commercial Science (DCS)
- The General Manager Program (TGMP)
- Harvard-Radcliffe Program in Business Administration (HRPBA)
- Industrial Administrator (IA)
- International Senior Management Program (IMP)
- International Teachers' Program (ITP)
- Middle-Management Program (MMP)
- Mid-Officer Certificate (MOC)
- PhD in Decision Sciences (PHDDS)
- Program for Global Leadership (PGL)
- Program for Management Development (PMD)
- Programs for Health System Management (PHSM)
- Senior Executive Program for the Middle East (SEPME)
- Senior Executive Program for Africa (SEPSA)
- Veterans' Certificate (VC)
- Visitor for Individual Studies (VIS)

## APPENDIX B

## Harvard University and HBS Logo/Trademark Guidelines

*Policies set forth by the University in regard to how Harvard trademarks may be used*

### I. HARVARD NAME AND TRADEMARK GUIDELINES

As of January 1, 2011, companies that are not licensed with Harvard University will no longer be authorized to produce merchandise bearing the University's trademarks. All vendors must be licensed and approved by the Harvard University Trademark Office to be permitted to produce insignia merchandise, regardless of whether or not such items are royalty-exempt or royalty-bearing.

This policy pertains to all items that are considered merchandise from a trademark licensing perspective and includes, but is not limited to: insignia apparel products such as t-shirts and fleeces, pens, mugs, novelty items, and unique products that may be ordered for special occasions and events.

Before placing any orders for merchandise bearing any Harvard trademark, please confirm with the [Harvard University Trademark Office \(trademark\\_program@harvard.edu\)](mailto:trademark_program@harvard.edu) that your vendor is on the University's approved vendor list.

Harvard University is increasingly concerned about the ways its name and symbols (or trademarks, such as "Harvard" and the "VERITAS shield") are being used by third parties. The Trademark Program is responsible for protecting the University's trademarks around the world and for licensing their use by third parties. The University's ability to both protect and control the use of its trademarks by others is enhanced because we have obtained, and are continuing to obtain, legal protection for many of Harvard's trademarks worldwide. To the extent that the University can unify the ways its trademarks are used, the better its chances of being able to stop unauthorized third parties from using the Harvard trademarks in objectionable ways and in ways which jeopardize the University's reputation. Harvard Business School Clubs and Associations can help with this effort by notifying the Trademark Program whenever its members become aware of any unauthorized uses of the Harvard name.

Since HBS Clubs are part of the Harvard University community, they must adhere to policies set forth by the University in regard to how Harvard trademarks may be used. HBS Clubs and Associations, like all other Harvard University units, need to comply with policies set forth in the "Policy on the Use of Harvard Names and Insignias" located on the [Provost's website \(http://www.provost.harvard.edu\)](http://www.provost.harvard.edu).

In addition to what is set forth in the Provost's policy, the following rules apply to all HBS Alumni Clubs:

1. All HBS Clubs recognize that the "Harvard," "VERITAS shield," "Harvard Business School," "Harvard Club," "Harvard Business School Club," "Harvard Business School Association" names and all other University trademarks (names, shields, and logos) are the sole property of the President and Fellows of Harvard College and are used by permission of the University.
2. HBS Clubs may not alter the Harvard "VERITAS shield," "Harvard Business School Shield" or "Harvard Business School logo" in any way. Newly created shields or HBS logos incorporating a HBS Club's name or logo are not permissible.

3. All HBS Clubs understand that they may only use the following names and shields” “Harvard Business School Club,” “HBS Club,” “Harvard Business School Association,” “HBS Association,” “Harvard Business School Shield” and “VERITAS shield.” Moreover, these names and marks may only be used to identify the Club on websites, signage, letterhead, business cards, and on some products (as defined below). Permission must be obtained from the Provost’s Office in order to use these marks for any purpose other than noted above or in order to use any University trademark other than those noted above. HBS Club activities should always be described as being undertaken by the “Harvard Business School Club of \_\_\_\_\_” and not by “Harvard Business School,” “Harvard,” or “Harvard University.”
4. Registration of any of Harvard’s trademarks anywhere in the world, including “Harvard Business School Club of \_\_\_\_\_” can only be done with written permission of the Trademark Program and any such registration must be owned by the President and Fellows of Harvard College.
5. HBS Clubs may sell items (t-shirts, mugs, etc.) bearing the HBS Club name alone or in combination with the HBS or VERITAS shield only to their members.\*
6. HBS Clubs may give away items (t-shirts, mugs, etc.) bearing the HBS Club name alone or in combination with the HBS or VERITAS shield to their members or to donors.\*
7. HBS Clubs may not sell any items bearing any of the University’s trademarks, including the HBS Club name alone or in combination with the HBS or VERITAS shield to the general public.

\*Provided that the items were produced by a Harvard University licensed vendor.

In cases where a HBS Club feels it has a situation that should be considered an exception to any of the above rules, please contact the [HBS Clubs Team](mailto:clubsteam@hbs.edu) (clubsteam@hbs.edu) or the [Harvard Trademark Program](mailto:trademark_program@harvard.edu)(trademark\_program@harvard.edu).

## **II. USING THE HARVARD BUSINESS SCHOOL NAME LOGO AND/OR SHIELD**

If a Club or Association wishes to use the HBS name logo and or HBS shield as part of the Club's identification, they can do so under the following conditions:

1. The Club does not use a custom club logo (the HBS name logo or shield logo cannot be used in conjunction with a club logo).
2. The shield and name logo (if used) must be positioned in close proximity to the Club's name.
3. Clubs must use the proper name and/or shield logo (when used) as provided by HBS Marketing & Communications. DO NOT ATTEMPT to recreate the logos or alter them in any way.
4. The shield logo should not be combined with other images—for example, with the logo of a program, company, or club; or with decorative elements such as globes or sprigs of ivy.

### **Trademark Notice**

Include the following Trademark Notice on print and digital materials that include one (or both) of the logos: "The Harvard Business School name and shield logos are trademarks of the President and Fellows of Harvard College and are used by permission of Harvard University."

### **Requesting the Name and/or Shield Logo(s) for Print & Web Usage**

Club and network-wide programming strand logos and logos can be requested from the [HBS Clubs Team](mailto:clubsteam@hbs.edu) (clubsteam@hbs.edu), which are limited to Community Partners, Social Enterprise, Startup Partners, and Alumni Angels.

### **Using the Name and/or Shield Logo(s) on Products (Working with Vendors)**

The [Harvard Trademark Program](#) requires that all products (t-shirts, etc.) depicting official HBS logos be produced by licensed vendors and approved by the Harvard University Trademark Office.

Before placing any orders for merchandise bearing any Harvard trademark, please confirm with the [Harvard University Trademark Office](mailto:trademark_program@harvard.edu) (trademark\_program@harvard.edu) that your vendor is on the University's approved vendor list.

### **Social Media References**

1. Club name must be preceded by "HBS" (e.g., HBS Club of San Diego, HBS Association of Northern California)
2. The following statement must be added to a club's bio or description "This is an alumni-run presence and is not managed by Harvard Business School (HBS)."
3. Any official alumni clubs may obtain standard graphics from the [HBS Clubs Team](mailto:clubsteam@hbs.edu) (clubsteam@hbs.edu) and are only to be used on the social media channels for which they have been designed.

### **Online Photo Library**

To obtain cost-effective and high-quality HBS imagery for use in HBS print/web publications, visit the online [photo library](https://identity.hbs.edu/photography/) (https://identity.hbs.edu/photography/).

- **Usage Rights for Clubs:** The School tries to purchase club usage rights for photo shoots whenever feasible so photos will be available to the clubs without a fee. These photos can be found by choosing "Clubs" on the initial splash screen (at upper right of the modal window).
- Photo rights labels can be found in database, in the single photo viewer sidebar. Alumni clubs can use any photo marked "Unlimited" or "Clubs" in the Usage Rights field. If you would like a photo that is marked "Restricted" or "School-wide," you will need to negotiate a usage fee with the photographer. For details on how to request a photo, see the "Online Photo Library" section of our [Photography](#) page.

## APPENDIX C

---

### **HBS Partnership Guidelines**

*Guidelines regarding corporate sponsorships and commercial relationships with third party product and service providers for alumni clubs.*

The Harvard University and Harvard Business School brands are highly desirable to commercial parties seeking co-branding, partnerships and endorsement opportunities. As a general rule the University and the School do not co-brand or endorse third party service providers nor do we market commercial products or services to our students, faculty, staff or alumni except in the form of paid advertising in the HBS Bulletin and Harvard Business Publishing materials like the Harvard Business Review. As a nonprofit organization, we must be vigilant in ensuring that others are not using the brand for profit making endeavors.

HBS, in accordance with guidance from the Harvard University Office of the General Counsel, advises HBS Alumni Clubs to exercise caution in deciding to work with corporate sponsors. Listed below are some general guidelines around corporate sponsorships and partnerships. Questions not addressed in this document should be directed to HBS Marketing & Communications at 617-495-6155.

#### **I. GUIDELINES FOR THIRD PARTY SPONSORSHIPS/PARTNERSHIPS**

1. HBS Alumni Clubs are NOT permitted to enter into any global agreements with third parties seeking to provide products or services to HBS alumni. The School will not recognize any such agreements and will not permit promotion of the relationships through official communications channels to alumni such as email, mail or advertising in the HBS Bulletin.
  
2. HBS Alumni Clubs MAY enter into sponsorship/partnership agreements with local corporations/organizations for the purposes of general Club funding, specific event sponsorships, and/or discounts on products/services from local corporations/organizations provided:
  - The Club represents itself appropriately as a separate and independent alumni club, not as Harvard Business School.
  - The sponsoring corporation/organization is appropriate to the mission of the Club and its members.
  - The amount of the sponsorship must not exceed the greater of:
    - a. the expenses for the particular event, or
    - b. the club's annual operating expenses
  - HBS Alumni Clubs seeking to engage in official relationships with providers of commercial products and services at the local level should exercise caution. Such relationships imply an endorsement by the Club and could also be perceived as an implied endorsement by the School. As a general rule, the School will not allow usage of the seal or logo in association with such local relationships although Club leadership can grant permission to third party providers to mention their affiliation with the Club on websites and in printed materials.

3. HBS Alumni Clubs must ensure that any arrangement of use of logo/name is expressly between the sponsoring organization and the HBS Alumni Club, NOT the Harvard Business School or Harvard University.
  - The names of sponsors for specific activities may be listed on websites, in publications or in other printed items pertaining to the activity. The listing should not be done in such a way as to suggest affiliation with or endorsement of the sponsor or its products or services by the University or its units.
  - No sponsor or third-party may use the insignia of Harvard or Harvard Business School without express written permission of the Harvard Trademark Program.
  - Disclaimer language (to the effect that Harvard University and Harvard Business School do not endorse products or services) must appear somewhere on all websites that include corporate names, logos, etc. No advertising text or banner ads are allowed.
  - Express written permission must be given by the Harvard Trademark Program for the use of the name or shield of Harvard University or any of the schools on any non-Harvard web page, or in any marketing or promotional materials for such a web page (this needs to be made clear to sponsors).

## APPENDIX D

### HBS Clubs & Associations Logos

"Harvard Business School" and the name and shield logos are registered trademarks and their use is governed by explicit rules and guidelines.

HBS-approved logos may only be used with the club name in the lock-ups shown below.

**Do not attempt to recreate** the logos or alter them in any way.

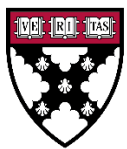
**Do not combine** the shield with another image or with decorative elements.

**Refer to Appendix B** for detailed Harvard University and HBS Logo/Trademark Guidelines and appropriate usage.

#### STANDARD CLUB LOCK-UPS

The lock-ups shown below are available for use online, in print, and on swag items. **Refer to Appendix B** for detailed Harvard University and HBS Logo/Trademark Guidelines and appropriate usage.

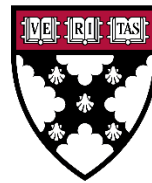
##### Horizontal Lock-up



**Harvard  
Business  
School**

**Club of  
Kansas City**

##### Vertical Lock-up



**Harvard  
Business  
School**  
**Club of  
Kansas City**

#### SIMPLIFIED SWAG LOCK-UP

An HBS-approved simplified club graphic is available for use on swag for instances when the standard lock-ups do not meet the imprint requirements. **Refer to Appendix B** for detailed Harvard University and HBS Logo/Trademark Guidelines and appropriate usage.



**Harvard<sup>®</sup>  
Business  
School**

**Club of Kansas City**

#### SOCIAL MEDIA

A social Media avatar is only to be used on social media channels and applications with image size restrictions that make the standard lock-up impractical. **Refer to Appendix B** for detailed Harvard



University and HBS Logo/Trademark Guidelines and appropriate usage.

