



HARVARD BUSINESS SCHOOL CLUB OF NEW YORK POLICY REGARDING PROGRAMS AND SPEAKERS

Context and Goals

The purpose of this Speaker Policy is to clarify for our community the type of programming that is consistent with our Charitable Purpose and our HBS Operating Agreement. It is also to clarify how programming decisions should be evaluated and approved. The goals of this policy are to simplify decision-making, ensure fidelity to our Charitable Purpose, and reduce the burden on Club Leadership in addressing escalations and mediating controversies.

The HBSCNY's Charitable Purpose and Mission

Our **Charitable Purpose** is the basis for our incorporation as a tax-exempt status and determined by the Operating Agreement we sign with HBS. It is to *build community among our alumni and foster their sense of connection with Harvard and HBS*. Our charitable purpose is enduring. Changes are only permitted through application to the New York State Attorney General.

We fulfill this Charitable Purpose through the **Club's Mission**, which does evolve from time to time with approval by our Board of Directors. Our mission is to *make a difference and support HBS by engaging alumni, impacting community, and fostering leadership and lifelong learning*.

To fulfill both our Charitable Purpose and our Mission, the Club offers speaker events throughout the year to our community of 13,000 Greater New York alumni.

We require all directors, members and speakers to comply with our **HBS Club of NY Community Values**:

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

Programming & Speaker Events

The Club's platform is proprietary and valuable. There are a limited number of openings in any given year for potential speaker events. The programming officers, along with other Club leadership, make decisions throughout the year on which speakers to place on our platform.

Speaker Selection

The Club's policy is to select speakers who positively engage our alumni and help us build community and connection, consistent with our Charitable Purpose.

The Club represents the largest and most diverse HBS alumni community in the world. To ensure the most effective use of our limited resources, we focus on programming broadly relevant to the professional interests of our alumni. We recognize that some members of our community may be interested in programming more targeted toward special demographic interests. To ensure our club allocates resources equitably to our diverse alumni community, this type of programming should generally be referred to the Special Interest Groups (SIG) alumni associations, which were formed for this purpose.

Political speakers are acceptable only under certain conditions as described below. Religious observances and political advocacy impermissible as Club-sponsored programming.

The views of speakers need not be compatible with those of the Club's Board and other leaders. Diverse viewpoints are welcome, even provocative views, as long as they comply with the Club's Community Values.

In any case, programming must conform to our commitments in our Operating Agreement with HBS to:

- Support Harvard and HBS and avoid doing harm to the reputation of Harvard University and HBS. Align with Harvard's policies.
- Remain neutral on all political issues both inside and outside the HBS community (see section on Hosting Politicians and Political Activists for more specifics).
- Comply with the Club's Community Values and help us create inclusive and welcoming spaces for dialogue and community-building.

Minimum requirements for granting access to our platform and community:

- Speakers and event organizers must not use our platform to promote views that disparage others or that advance divisive views. Speakers and event organizers may not engage in discrimination, bullying or harassment.
- Consistent with our Operating Agreement, our platform must not be used to publicly disparage or criticize Harvard University or Harvard Business School, discourage giving, or otherwise harm the institution.
- Religious and political advocacy are disallowed. Our community is diverse and we are unable to host religious observances.
- Speakers may not use the Club's platform to discuss active legal disputes or pending or active litigation. If proposed speakers are involved in legally sensitive

matters, the Club Chair or President should consult with our Club attorney before approving the speaker; in most cases, the speaker should be deferred until the matter is resolved.

Hosting Politicians and Political Activists

We recognize that some politicians or politically active speakers may be of interest to our community and may have leadership qualities consistent with our Core Values that are worthy of amplifying on our platform.

Even so, judgement is required to ensure such speakers do not compromise the Club's political neutrality. As general guidelines:

- It is preferable for any political speakers, or speakers associated with political activism, to be Harvard alumni, faculty or fellows.
- To maintain the Club's political neutrality, program organizers should ensure that the program offers balanced perspectives in the selection of other panelists or moderators.

Programming Related to Social Justice Activities

We recognize that inequities and social justice issues may impact members of our community. In some cases, it may be important for the Club to address these to fulfill our duties of inclusivity and community-building.

While the Club may make statements or take actions to address inequities that impact our community, it has been the Club's long-standing practice to avoid programming focused on a single demographic of our alumni community. With more than 13,000 regional alumni served by our Club, it would be impossible to ensure that resources are fairly distributed if we did so.

Occasionally, usually in response to socio-political events impacting our community, Club Directors and Officers have formed informal working groups to evaluate issues and recommend actions, if appropriate, to be approved by the Board of Directors. Such working groups are advisory and temporary in nature and their duration should be limited to one year.

Book Clubs and Brown Bag Lunches

We do not review or restrict book selections for Book Clubs or topics for Brown Bag Lunches (BBLs), but we do reserve the right to limit the use of our platform to promote books that may be of questionable scholarship or topics/ books that could cause division among our community.

In accordance with our duty to remain politically neutral, discussion groups with politically focused themes must maintain a non-partisan approach. Best efforts should be undertaken to ensure balance and respect for a plurality of perspectives. Those involving sensitive issues of identity and faith must also be respectful. Invitations and event descriptions should reflect balanced viewpoints.

Promotion of other HBS Alumni Association Club Programming and non-HBS Club Programming

Due to the size and scale of our community, our Club receives frequent requests to promote events hosted by other organizations. This must be carefully managed to avoid overextending Club staff, to avoid conflicts with our own full programming calendar, and to avoid diluting our own platform.

- **Other Regional Alumni Clubs:** At the discretion of the Programming Officers, we occasionally co-host Zoom events with other regional HBS alumni clubs.
- **Special Interest Groups:** Although SIGs focus on more targeted demographic programming, we sometimes co-host events with SIGs when speakers have broad relevance to our community. Examples include hosting HBS faculty or high-profile business leaders. We should limit using our platform to promote SIG events that are targeted to a single demographic group of our alumni community.
- **Non-HBS-Related Speakers:** as a general rule, aside from speaker or networking events hosted by other university alumni clubs, outside events should not be promoted on our platform.

Required Use of Disclaimer

The Club should always state explicitly in relevant materials that the views of speakers are their own, not those of the Club or its leadership.

Upon registration for certain events, it may be advisable to require the registrant to agree to abide by our Community Values, listed on our website.

Written Materials and Documentation

Event invitations and descriptions that are posted on the Club's website or included in newsletters, as well as social media posts and event videos, must be approved by the speakers before they are posted or distributed. The Club maintains a standard input and approval form that should be used for this purpose. The completed forms should be sent to and maintained by the appropriate Programming Officer or Club staff member

The name and logo of the Club are exclusive and proprietary. Aside from event notifications and invitations, they shall not be used in any electronic or printed materials without the prior written consent of the Club's Programming Officers and our Club's Board of Directors.

It is our Club's policy to avoid issuing written statements or reports. In the rare case that an exception is made, such materials require advance review by the Club's attorney. In accordance with our Operating Agreement governing use of the school's name and logo, the HBS External Relations team must also provide written approval for the use of the Club name and logo on any written statements or reports.

Responsibilities

It is the responsibility of the Programming Officers to approve speakers. Some circumstances may require consultation with, or escalation to, the President of the Club and/or Board Chair. **All speakers must be approved by either a Programming Officer or the Club President or Chair.**

It is within the sole discretion of the Club Chair to disallow any speaker from our platform. Consistent with our Code of Conduct, directors, officers and members of our community are expected to respect and support the actions taken by Club Leadership even if he or she personally disagrees. Disrespectful or prolonged challenges to leadership decisions will be considered a violation of our Code of Conduct and addressed as such.

Adopted by the HBSCNY Board of Directors on June 11, 2025