



Chapter Chat: Strategic Planning

GINNY RITENOUR, CHAPTER PROGRAMS

MAY 29, 2020





CHAPTER PROGRAM UPDATES

- Annual plans and end-of-year reporting
- Virtual university events
- Virtual chapter events
- Virtual Reunion programming
- Student Send-Offs
- Chapter Officers Forum: Sept. 3 – 5
- Welcome New Alumni Parties and Game Watching Parties

A hand-drawn strategic planning diagram on a green chalkboard. The diagram features a central circle with several arrows pointing outwards. A dashed line forms a large arc across the top, with an 'X' marked on it. Another dashed line forms a large arc across the bottom, with an 'X' marked on it. A hand is visible in the bottom right corner, holding a piece of chalk and pointing towards the bottom dashed line. The background is a green chalkboard with faint grid lines.

01

STRATEGIC PLANNING OVERVIEW

Why do chapters need to make an annual plan?



- Take away the guesswork!
- Avoid frustration and misunderstandings
- Allow ample time for planning
- Host meaningful programs
- Have fun!

YOUR STRATEGIC PLANNING TOOLKIT

MISSION AND VALUES

Ensure your events and programs align with University, Advancement, and chapter mission and values

AWARDS CHECKLIST

Use your annual awards checklist as a guideline for goals to meet throughout the year



S.M.A.R.T. GOALS

Set clear goals that are specific, measureable, achievable, relevant, and timely

3-PART ANNUAL PLAN

Consider the events, volunteers, and communications needed to achieve your chapter's goals



STRATEGIC PLANNING TOOLKIT

- ☐ Review University and Advancement Mission and Values
- ☐ Review Chapter Award Program Requirements Checklist
- ☐ Review Key Chapter Programs & Important Deadlines
- ☐ Set SMART goals for the upcoming year
- ☐ Make a 3-part Strategic Annual Plan
(Events, Volunteers, Communication)
- ☐ Review plan with your chapter liaison



02

MISSION & VALUES

Advancement Division Mission Statement

The Division of University Advancement is committed to informing, engaging, partnering with, and securing financial support from a diverse spectrum of audiences through integrated, strategically aligned communications, engagement programs, and philanthropic opportunities. We build lifelong relationships that engage the time, loyalty, and intellectual and financial resources in support of Virginia Tech's aspirations, goals, and broader land-grant mission to serve society.

Advancement Core Values

1. The Division of University Advancement endorses and is guided by the Principles of Community.
2. We are committed to transparency, collaboration, and consistency in operations between the central offices and those in the colleges and units.
3. We are firmly committed to an audience-centered approach in our communications, engagement, and philanthropic activities.
4. We are committed to a performance-based culture of excellence and accountability as a means of reaching our organizational goals and the personal and professional development goals of our staff.
5. We will strive for continuous program innovation that will support the university's goals and leadership position in higher education.



02

ANNUAL CHAPTER CHECKLIST

New this year!

- Chapter Achievement Awards - replacing “Outstanding Chapter”
- Annual checklist is tailored to three different chapter tiers
- Completion of checklist = Achievement Award
 - Receive scholarship fund award (\$250-350)
 - Signed football
 - Recognition gift for chapter officers
 - Social media award badge
- Superlative Awards (Outstanding Chapter Event, etc.)
 - Self-nominated by chapters
 - Narrowed by Chapter Team to three nominees
 - Voted on and selected by ALL chapter officers
 - Addition of “Chapter of the Year”

Annual Chapter Checklist

- While not REQUIRED, each chapter is encouraged to complete the checklist and will be guided by liaison throughout the year
- Focus is on QUALITY over QUANTITY and creating a meaningful and satisfying experience for volunteers and participants
- These are the MINIMUM expectations; chapters are welcome to go above and beyond the number and types of events - our team will support your work at ANY level!



03

S.M.A.R.T. GOALS



Goal Setting Prompts

- Review last year's programs: Highlights? Challenges? Areas for improvement
- What's going well and what isn't?
- Which events are MUST-DO's (signature events and checklist requirements)?
- Do your planned events align with the mission and values?
- What can be CROSSED OFF the list?
- What are the fundraising goals for the year? Set a specific dollar goal!
- What are the communications and marketing gaps? Create a timeline!
- What volunteer support is needed?
 - Long-term (leadership positions)
 - Short-term (committee members)
 - One-time (related to specific events)



04

3-PART STRATEGIC PLAN

CREATE A 3-PART STRATEGIC PLAN



EVENTS

WHAT events will you host this year?
WHEN will you put them on the calendar?



VOLUNTEERS

Where do you have gaps?
What qualities/skills are you looking for?
When do you recruit?
How and where do you plan to recruit?



COMMUNICATIONS + MARKETING

How often will you send communications?
What types of platforms will you use?
What needs to be included in each communication?

Events

- WHAT are the must-do events for this year? What's on the wish list?
- WHY do you want to do these particular events?
- Do these events align with the mission and values?
- What can you cross off the list?
- Considering diversity and inclusion: who is MISSING?
- Plan early! Set goal dates for the ENTIRE YEAR and make adjustments as needed (go ahead and put goal dates on Alumni Spaces)

Volunteers

- Assess your current volunteer roster: where are the gaps?
- Dynamic leadership: turnover AND experience
- Provide volunteer job descriptions on your website
- Recruitment
 - What can the chapter do to recruit?
 - What support can your liaison provide?
 - Leverage your events and networks!
- Soliciting a volunteer
 - What job are you asking them to do? What is the time commitment?
 - Why are they the right person for the position?
- Volunteer onboarding
 - New Chapter Officer Training video available online
 - Join the Chapter Officers Facebook group
 - Consider attending Chapter Officers Forum

Communications and Marketing

- Planning ahead is KEY for communications!
- Use central emails AND combination of local list-serv and social media
- Emails aren't only for events! Keep in touch on a regular basis
- Post-event follow-up: email attendees to thank them, invite to next event
- Use a calendar with a template/schedule for regular posts
 - Sharing university/advancement messages
 - Highlighting local alumni and students and events
 - Encourage feedback/engagement with questions or contests for local Hokies



Questions?



Chapter Program Contacts:.

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