Thinking Ahead

Strategic Annual Planning

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Strategic Planning

- Process of defining a chapter or interest group’s direction and allocating its resources to pursue this strategy
- Sets priorities, focuses energy and resources, strengthens operations, and ensures everyone is working toward a common goal
- Provides roadmap for the coming year, so things flow smoothly
Mission and Vision

• **Mission:** The Emory Alumni Association connects alumni to the University and to each other, builds traditions, fosters student and alumni leadership, serves the diverse needs and interests of our community, and creates opportunities for investment in Emory's future.

• **Vision:** The Emory Alumni Association's vision is to develop a dedicated and dynamic global alumni community whose members are committed to each other, devoted to Emory's mission, and invested in its future.
Creating Your Roadmap

- Emory fiscal year: Sept 1 – Aug 31
- July to August is a great time to talk to your liaison about your plan for the next year
- Each chapter or interest group will have different goals and budget based on number of constituents, community culture, and volunteer leadership
Creating Your Roadmap

• First, decide approximately how many events your group will host
• Small market: 2-4 events a year
• Midsize market: 4-8 events a year
• Large market: 8-12 events a year
• Consider quality over quantity, budget, and what your market can support without oversaturation
Creating Your Roadmap

• Next, outline when your events will take place
• Think seasonally and avoid holidays, school breaks
• Consider annual signature programs
• Example:
  • Atlanta Young Alumni
    • Fall: Emory Cares
    • Winter: Holiday Party
    • Spring: Lobby Hosting with Admissions
    • Summer: Sweetwater Social
Creating Your Roadmap

• Consider all of the modules:
  • Social, service, educational, student, professional, philanthropy
• One signature event can reach multiple modules
• Fill in the gaps with additional activities
Sample Roadmap

- **Nashville:**
  - 6 events bi-monthly
    - September – Presidential event
    - October/November – Emory Cares
    - December – Holiday Party
    - January/February – Interviewing kickoff or wrap up event
    - March/April – Sporting event
    - May/June – Vineyard Tour/Tasting
    - July/August – Destination Emory
Budgeting

- Lastly, work with your liaison to determine your budget strategy for the coming fiscal year
- Draft a proposal for budget allocations by event
- Certain programs may be more costly than others – decide where to invest and which should break even
- All event revenue stays with your group
- Note if there are any special expenses in the coming year such as an anniversary or unique program
- Remember, any remaining budget does not roll over
EMORY ALUMNI ASSOCIATION

Annual Planning Process

- Ideas
- Planning
- Implementation

Success
Questions