

35

**UNIVERSITY OF WASHINGTON
ALUMNI ASSOCIATION
STRATEGIC PLAN**

VISION DOCUMENT: 2005 – 2010

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Staying Connected—
Makes a Difference

I have copied a few pages of the University of Washington Alumni Association Strategic Plan written in 2005 things to be aware of are

- 1] The Plan has a statement of Mission- Vision-Core Values-Our Culture and a few samples of the Strategic Plan for a business element
- 2] Each business element is assigned to someone in the organization

2] The Strategic Plan has each business element described with 4 components

a] A paragraph describing the future

b] A statement on where we are now

c] The next steps required to accomplish the vision and

d] A chart that defines when the next steps will be accomplished by and how much it is expected to cost –show in a 3 year look forward. This allows the discussion on employee tasks and projects the budget implications.

THE GOAL OF THIS APPROACH IS TO INTERGRATE THE STRATEGIC PLAN INTO THE OPERATION –BOTH IN EMPLOYEE TASKS AND ACCOUNTABLITY AS WELL AS INTO THE OPERARING BUDEGET.

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TABLE OF CONTENTS

Executive Summary	3
. UWAA Identity Attributes	5
I. Mission, Vision, Core Values and Culture Statements	6
/ Strategic Plan Performance Measures	9
. Strategic Initiatives	11
Part 1 -- Organizational Effectiveness	11
Part 2 -- Alumni Relations	39
Part 3 -- University Support	73
. Conclusion	79

III. MISSION, VISION, CORE VALUES & CULTURE STATEMENTS

Our Mission

We reach, connect and celebrate alumni and friends of the University to build lifelong relationships, and to support the University's mission.

Our Vision

We are dedicated to excellence through delivering the finest programs, events and communications to keep our alumni and friends mutually connected with the University. We are passionate about engaging our alumni and friends in the life of the University, its students and its mission. As a result, our constituents judge our performance as exceptional, and peer institutions seek advice on how to replicate our success.

Our Core Values

We Value:

- Advocating for our University and its mission.
- Offering lifelong learning through cultural, educational, recreational and social activities.
- Preserving University and UWAA traditions.
- Providing meaningful benefits and opportunities for our alumni association members.
- Promoting a climate that fosters understanding of and value for diversity, including support of the University's diversity initiatives.
- Contributing to a positive student experience.
- Continuing our volunteer service and leadership, while providing a fun, satisfying and meaningful experiences.
- Remaining fiscally responsible and managing UWAA for the long term.
- Ensuring excellence, integrity, leadership, creativity, fun, teamwork, and recognition – both in our staff and volunteers.
- Retaining our staff members, promoting their professional development and contributing to their personal well-being.

Our Culture

We are known to have an outstanding work environment and culture. How we work and communicate and treat each other and how we work and communicate with one another makes UWAA a great, creative and fun place to work.

- We are passionate and take pride in the work of our organization and in our individual roles.
- We are invested in and supportive of the success of one another's events, programs, communications and professional development.
- We ensure a culture that is committed to positive participation within a supportive environment. We have fun and respect each other.
- We value new ideas. We commit to embracing change as a group and as individuals.
- We value diversity of opinion and perspective.

- 5. UWAA Programming and Communications:**
Oversight: The House Committee and Marketing, Membership, and Communication Committee.
- Report on participation: we will track attendance at events annually (event specific). Special attention will be placed on career and life-long learning participation. For events where data is gathered, we will report on member vs. non-member attendance statistics.
 - Conduct surveys to assess the quality of our events. We will survey participants at selected events to ensure we are producing quality programs.
 - Track and provide information on participant demographics. We will report on targeted audience participation of our events and track this participation annually. We will also report on new events and how we are reaching targeted audiences.
 - Create a metric for economic efficiency. We will target cost per head for selected events and compare against actual.
 - Increase the effectiveness of various event marketing tools through survey information and refine our communications plan as indicated.
- 6. Individual Staff Performance Objectives:**
Oversight: The executive director will report to the executive committee on the staff's overall compliance to this goal.

Conclusion:
By August 15th each year, the UWAA management team will present a performance measurement update to the Board of Trustees Executive Committee. This report will also be made to the UWAA Board of Trustees at the September meeting. The objective of this effort is to ensure UWAA's management team stays focused and understands how well the Association is performing against defined standards.

1. STRATEGIC PLANNING PROCESS (ISSUE MANAGEMENT)

C. Strategic Business Planning (John Buller)

Strategic visions drive the need to clearly define staff activities and financial resources required to move the UWAA forward in accomplishing these visions. The strategic business plan defines the important steps required, the sequence in which they need to be accomplished, and the financial resources required for the next three years over and above our current base year budget. Our process ensures that management and volunteer leadership understand sustainability of these efforts as they relate to staff time and money.

- Staff members understand the business plan development process and are expected to incorporate the business plan into their individual annual operating budgets.
- The Executive Committee has the responsibility to submit to the Board of Trustees for their approval an annual budget accompanied by an updated strategic vision and a three-year rolling business plan.

Where we are:

Each vision must have a 3 year Business plan (Actions and Spending Money) prior to passing the next year's budget. We are getting better but not 100%- new Great Plains Accounting System will help a great deal.

Next Steps...

1. Tailor the Great Plains Accounting System
2. Hire part time CFO to manage our Financial Operation John Buller
3. Financial System

Objective: new culture, correct updates, closing, 2005-06 budgets in Great Plains

- More programming; event level detail
- Affinity & scholarship policies & programming
- Monthly meeting with staff – Direct Reports
- Coding & Roll-ups
- Change roll-ups – volunteer partner programs, UWAA events
- Useful reports; accurate reports
- Define the accounting go-to person; Keith Ritzmann

Business Plan Forecast			
Activity	FY2005-06	FY2006-07	FY2007-08
Tailor the Great Plains Accounting System	\$15.0		
Hire part time CFO to manage our Financial Operation (costs included under #5)			
Financial System (see above)	√		

University of Washington Alumni Association - Strategic Plan: 2005 - 2010

Business Plan Forecast			
Activity	FY2005-06	FY2006-07	FY2007-08
Software Identification Purchase	\$2,500	\$500	\$700
Review where we are by mid fall 2005	√		
Identify Key Changes – and process to committees and executive committee	√		
Review all visions with the added filters of long term sustainability and how each activity aligns with the University's objectives and clarifying next steps to get more aligned	√		
Create 3 year business plans and 2005/06 budget	√		
Project the effect of a 33% budget cut on the overall Strategic Plan	√		