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

University Motto

Our motto, Ut Prosim (That I May Serve), emphasizes our commitment to serve individuals and society.

University Vision

Virginia Tech will be a global leader by inspiring and empowering people to learn, innovate, and serve beyond boundaries.

University Mission

Inspired by our land-grant identity and guided by our motto, Ut Prosim (That I May Serve), Virginia Tech is an inclusive community of knowledge, discovery, and creativity dedicated to improving the quality of life and the human condition within the Commonwealth of Virginia and throughout the world.

University Values

Diverse and Inclusive Communities
Knowledge and Innovation
Opportunity and Affordability
Excellence and Integrity

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

Maroon Chapter Pylon Status Checklist 2020-21

Activities to be completed between July 1, 2020 and June 30, 2021

Chapter: _____

Yes/No	
	Communicated at least quarterly with chapter liaison
	Held regularly scheduled chapter meetings (monthly, quarterly, conference calls, etc.)
	Submitted all chapter reports via Alumni Spaces at least quarterly (meeting and events)
	Submitted signed Memorandum of Understanding (must be completed every year)
	Submitted updated officer contact information for the upcoming year (due June 30, 2021)
	Submitted the annual plan for the upcoming year (due June 30, 2021)
	Submitted at least one mailer/email request through VTAA central communications
	Submitted year-end financial report (due June 30, 2021)
	Submitted event registration lists when appropriate
	Shared Advancement priorities through social media, meetings, and events **monthly**
	Demonstrated support of Virginia Tech's Inclusion and Diversity initiatives
	Maintained updated social media and web presence (not more than 30 days out of date)
	Hosted minimum of ONE social event (includes game watching parties)
	Participated in **The Alumni Big Event**

Orange Chapter Pylon Status Checklist 2020-21

Activities to be completed between July 1, 2020 and June 30, 2021

Chapter: _____

Yes/No	
	Communicated at least quarterly with chapter liaison
	Held regularly scheduled chapter meetings (monthly, quarterly, conference calls, etc.)
	Submitted all chapter reports via Alumni Spaces within one month (meeting and events)
	Submitted signed Memorandum of Understanding (must be completed every year)
	Submitted updated officer contact information for the upcoming year (due June 30, 2021)
	Submitted the annual plan for the upcoming year (due June 30, 2021)
	Submitted at least one mailer/email request through VTAA central communications
	Awarded chapter scholarship(s) for upcoming year
	Submitted year-end financial report (due June 30, 2021)
	Submitted event registration lists when appropriate
	Shared Advancement priorities through social media, meetings, and events **twice per month**
	Demonstrated support of Virginia Tech's Inclusion and Diversity initiatives
	Maintained updated social media and web presence (not more than 30 days out of date)
	Actively supported Virginia Tech's Giving Day via social media
	At least one chapter representative attended a VTAA training event (Chapter Officers Forum or webinar)
	Hosted **Welcome New Alumni Party**
	Hosted football and/or basketball **Game Watching Parties** (minimum of TWO)
	Participated in **The Alumni Big Event**
	Hosted a **Speaker Event** (faculty, alumni, local community member)
	Hosted a **Student Send-Off Event**
	Hosted at least **one** Donorship Event (gift included with registration - may be combined with existing event)

Focus Area Pylon Status Checklist 2020-21

Activities to be completed between July 1, 2020 and June 30, 2021

Chapter: _____

Yes/No	
	Communicated at least monthly with chapter liaison
	Held regularly scheduled chapter meetings (monthly, quarterly, conference calls, etc.)
	Submitted all chapter reports via Alumni Spaces within one month (meeting and events)
	Submitted signed Memorandum of Understanding (must be completed every year)
	Submitted updated officer contact information for the upcoming year (due June 30, 2021)
	Submitted the annual plan for the upcoming year (due June 30, 2021)
	Submitted at least one mailer/email request through VTAA central communications
	Awarded chapter scholarship(s) for upcoming year
	Submitted year-end financial report (due June 30, 2021)
	Submitted event registration lists when appropriate
	Shared Advancement priorities through social media, meetings, and events **weekly**
	Demonstrated support of Virginia Tech's Inclusion and Diversity initiatives
	Maintained updated social media and web presence (not more than 30 days out of date)
	Actively supported Virginia Tech's Giving Day via social media
	At least two chapter representatives attended a VTAA training event (Chapter Officers Forum or webinar)
	Hosted **Welcome New Alumni Party**
	Hosted football and/or basketball **Game Watching Parties** (minimum of TWO)
	Participated in **The Alumni Big Event**
	Hosted a **Speaker Event** (faculty, alumni, local community member)
	Hosted a **Student Send-Off Event**
	Hosted a **Professional Networking Event**
	Hosted regular **Hokie Happy Hours** (coordinated with Young Alumni Committee where applicable)
	Hosted at least **two** **Donorship Events** (gift included with registration - may be combined with existing event)
	Developed succession plan for chapter leadership (submitted via Alumni Spaces form)

KEY CHAPTER PROGRAMS & IMPORTANT DEADLINES

SIGNATURE CHAPTER EVENTS:

- Welcome New Alumni Parties – third Thursday in August
- Football Game Watching Parties throughout the fall
- Giving Day – mid-March
- The Alumni Big Event – first Saturday in April
- Student Send-Off Events – late June or early August
- Chapter Officers Forum – first home football game weekend in Blacksburg (early September)
- Speaker Events – late winter or early spring

COMMUNICATIONS GUIDELINES

- Use central emails often: make sure ALL alumni in the area receive regular updates
- Emails do not need to be reserved for EVENTS ONLY; consider sending emails for volunteer recruitment, social media promotion, contact updates, etc.
- Allow 5 business day turnaround for emails
- Postcards are available TWICE per year; allow 6-8 week turnaround

IMPORTANT DEADLINES

- July 31: Submit football game watching party details to chapter liaison
- October 20: Request postcard mailer for holiday parties (confirm with liaison)
- March 1: Submit Big Event details to chapter liaison
- March 15: Submit Day of Remembrance event details to chapter liaison
- April 15: Submit details for JUNE Student Send-offs to chapter liaison
- June 5: Submit details for AUGUST Student Send-offs to chapter liaison
- June 30: Submit Welcome New Alumni Party details to chapter liaison
- June 30: ALL end of year reporting and chapter award nominations due

S.M.A.R.T. GOALS
Chapter Goal Setting Exercise

S.M.A.R.T. GOALS:

- Specific – state exactly what you want to accomplish this year
- Measureable – use smaller, mini-goals to measure progress
- Achievable – make your goal reasonable from a volunteer/resources perspective
- Realistic – set a goal that is relevant to Virginia Tech's mission and values
- Timely – give yourself ample time to plan but set clear deadlines

WHAT ARE THE TOP 5 GOALS FOR YOUR CHAPTER THIS YEAR?
(Examples: recruit volunteers, raise $X scholarship funds, reboot signature event)

1. _____

2. _____

3. _____

4. _____

5. _____

CONSIDER THE FOLLOWING QUESTIONS FOR EACH GOAL:

- Does this goal meet the S.M.A.R.T. guidelines?
- Does this goal meet Virginia Tech's and Advancement's mission and values?
- How many volunteers are needed to achieve this goal? Do we have them already?
- Do we have enough time and resources for proper planning?
- How can we break this down into mini-goals and set deadlines to stay on track?
- How will we know we have succeeded? (attendance or fundraising goals)
- Will this accomplishment be meaningful to our volunteer team and local alumni?

STRATEGIC ANNUAL PLAN

What do we want to accomplish this year?

After setting your chapter's S.M.A.R.T. goals for the upcoming year, consider the events, volunteers, and communications needed to achieve those goals.

EVENTS AND PROGRAMS

What events and/or programs do we need to focus on this year to achieve our goals?

1. _____

2. _____

3. _____

4. _____

5. _____

VOLUNTEERS

What leadership positions need to be filled? What one-time volunteer needs exist?

1. _____

2. _____

3. _____

4. _____

5. _____

COMMUNICATIONS AND MARKETING

What are the key areas we need to focus on? (social media, website, central emails)
Begin creating a communications timeline or marketing plan for signature events

_____

_____

_____

_____

_____

_____

First State Chapter, Virginia Tech Alumni Association

2019-2020 Plan

July xx   Submit 990-N

July 14   Diversity/Inclusion event, ice cream social, Woodside Farms, Hockessin, DE

Aug 10   Tubing on the Brandywine

Aug 22   Welcome 2019 Grads, 6 p.m., Catherine Rooneys

Aug 31   Football watching, VT @ BC, 4 p.m., Catherine Rooneys

Sep 19   Popup Happy Hour at Autumn Arch Beer Project, 5:30 p.m.

Oct 5   Football watching, VT @ Miami, 3:30 p.m., Catherine Rooneys & Rehoboth Ale House

Oct 21   Support for VT Admissions (Chester County, PA)

Oct 23   Stockings for Soldiers (prep work), Brandywine Town Center, 6:30 to 8:30 p.m.

Nov 2   Football watching, VT @. Notre Dame, 2:30 p.m., Catherine Rooneys

Nov 12   Stockings for Soldiers (stuffing stockings), Brandywine Town Center, 6:30 to 8:30 p.m.

Nov 12, 13, 14   Support for VT admissions (in each Delaware county)

Nov 29   Football watching, VT @ UVA, time TBD, Catherine Rooneys

Dec/Jan   Football watching, bowl game time and location TBD

Jan xx   Ronald McDonald House Baking (Hal), date to be confirmed

Jan xx   Advancement initiative

Feb xx   Special Olympics DE Polar Bear Plunge, Rehoboth Beach, DE (Steve)

Mar xx   VT speaker event, TBD

Mar 18-20 VT Giving Day

Apr xx   Big Event/Habitat for Humanity Build (Hal), date to be requested by Hal

May xx   Networking event at Liquid Alchemy or other suitable venue, 5:30 p.m.

May xx   Young Alumni event, Constitution Yards or other suitable venue, 5:30 p.m.

June xx   Special Olympics DE Summer Games, Newark, DE (Steve)

June 28   Student Send-off Picnic, Glasgow Park, 2275 Pulaski Highway, Newark, DE, 1:30 p.m. – 4:30
                   p.m. (will try and reserve Pavilion #1)

NC Triad VA Tech Alumni Chapter
2019-20 Annual Plan

Chapter 2019-20 Mission:

- o We are focus on Service for the academic fiscal year.....Community Service/Ut Prosim
- o The chapter will increase the number service initiatives for the year.

Chapter Officers:

- o President Co-Thomas Doorn and Whitney Dawson
- o Treasurer- Linda Allen
- o Social Events Chair- Leslie McNiece
- o Service Project Co Chairs- Tom Parker/ John Walton
- o Diversity/Inclusion Chair- Eric Eley
- o Fundraising Chair- Jim Goff
- o Scholarship Chair- Linda Allen
- o Student Send Off Picnic Chair- Jim Goff
- o Speaker Chair- Eric Eley
- o Young Alumni Chair- Thomas Doorn until a replacement is identified
- o Marketing/Social Media- Whitney Dawson until replacement is identified

2019-2020 Master Calendar		
Date	**Event**	**In-Charge**
7/8/2019	Hokie Connect Monthly Meeting	Thomas Doorn/Whitney Dawson
7/18/2019	Hokie Happy Hour (GSO)	Leslie McNiece
8/1/2019	Student Send-Off Picnic	Jim & Tricia Goff
8/12/2019	Hokie Connect Monthly Meeting	Thomas Doorn/Whitney Dawson
8/15/2019	Hokie Happy Hour (WS)	Leslie McNiece
8/22/2019	New Alumni Welcome Event	Eric Eley/Leslie McNiece
8/31/2019	Game Watching (Boston College)	TBD
9/9/2019	Hokie Connect Monthly Meeting	Thomas Doorn/Whitney Dawson
9/19/2019	Hokie Happy Hour (GSO)	Leslie McNiece
9/27/2019	Officers' Forum Weekend in Blacksburg	Thomas, Whitney, Eric, Jim (?)
Sept. or Oct.	Out of the Garden	John Walton
Sept. or Oct.	Fall Speaker Event	TBD
10/5/2019	Game Watching (Miami)	TBD

10/7/2019 (?)	Forsyth County College Fair	Eric Eley/Jim Goff
10/8/2019 (?)	Guilford County College Fair	Eric Eley/Jim Goff
10/14/2019	Hokie Connect Monthly Meeting	Thomas Doorn/Whitney Dawson
10/17/2019	Hokie Happy Hour (WS)	Leslie McNiece
11/11/2019	Hokie Connect Monthly Meeting	Thomas Doorn/Whitney Dawson
11/16/2019	Game Watching (Georgia Tech)	TBD
11/21/2019	Hokie Happy Hour (GSO)	Leslie McNiece
12/6/2019	Holiday Party	Kimbros
12/9/2019	Hokie Connect Monthly Meeting	Thomas Doorn/Whitney Dawson
1/13/2020	Hokie Connect Monthly Meeting	Thomas Doorn/Whitney Dawson
2/10/2020	Hokie Connect Monthly Meeting	Thomas Dorn/Whitney Dawson
2/20/2020	Hokie Happy Hour (WS)	Leslie McNiece
3/9/2020	Hokie Connect Monthly Meeting	Thomas Doorn/Whitney Dawson
3/19/2020	Hokie Happy Hour (GSO)	Leslie McNiece
March or May	Spring Speaker Event	TBD
4/4/2020	Habitat for Humanity (Big Event)	Tom Parker (?)
4/13/2020	Hokie Connect Monthly Meeting	Thomas Doorn/Whitney Dawson
4/16/2020	Hokie Happy Hour (WS)	Leslie McNiece
4/18/2020	SECU Family House	Linda Allen
5/11/2020	Hokie Connect Monthly Meeting	Thomas Doorn/Whitney Dawson
5/21/2020	Hokie Happy Hour (GSO)	Leslie McNiece
6/8/2020	Hokie Connect Monthly Meeting / Planning Session for 2020-2021	Thomas Doorn/Whitney Dawson
6/18/2020	Hokie Happy Hour (WS)	Leslie McNiece
June	Habitat for Humanity	Tom Parker (?)

Subject	Location	Start	End
Virginia Tech Men's Basketball vs NC State	VT	Sat 1/11/2020 2:00 PM	Sat 1/11/2020 4:00 PM
Virginia Tech Men's Basketball at Wake Forest	Winston-Salem, N.C.	Tue 1/14/2020 9:00 PM	Tue 1/14/2020 11:00 PM
Virginia Tech Men's Basketball vs Syracuse	VT	Sat 1/18/2020 12:00 PM	Sat 1/18/2020 2:00 PM
Virginia Tech Men's Basketball vs North Carolina	VT	Wed 1/22/2020 8:00 PM	Wed 1/22/2020 10:00 PM
Hokie Happy Hour	TBD	Thu 1/23/2020 5:30 PM	Thu 1/23/2020 7:30 PM
Virginia Tech Men's Basketball at Boston College	Chestnut Hill, Mass.	Sat 1/25/2020 2:00 PM	Sat 1/25/2020 4:00 PM
Virginia Tech Men's Basketball at Miami	Coral Gables, Fla.	Tue 1/28/2020 8:00 PM	Tue 1/28/2020 10:00 PM
Virginia Tech Men's Basketball vs Florida State	VT	Sat 2/1/2020 4:00 PM	Sat 2/1/2020 6:00 PM
Virginia Tech Men's Basketball at Georgia Tech	Atlanta, Ga.	Tue 2/4/2020 7:00 PM	Tue 2/4/2020 9:00 PM
Virginia Tech Men's Basketball vs Boston College	VT	Sat 2/8/2020 12:00 PM	Sat 2/8/2020 2:00 PM
VTAA Tidewater Chapter Meeting	Keagan's Towncenter	Tue 2/11/2020 6:00 PM	Tue 2/11/2020 8:00 PM
Virginia Tech Men's Basketball vs Pitt	VT	Sat 2/15/2020 12:00 AM	Sun 2/16/2020 12:00 AM
Virginia Tech Men's Basketball vs Miami	VT	Wed 2/19/2020 9:00 PM	Wed 2/19/2020 11:00 PM
VT vs Duke Basketball Game Watching Party	CP Shuckers	Sat 2/22/2020 4:00 PM	Sat 2/22/2020 6:00 PM
Hokie Happy Hour - VT vs UVA Basketball Game Watchir	CP Shuckers	Wed 2/26/2020 6:00 PM	Wed 2/26/2020 9:00 PM
Virginia Tech Men's Basketball at Louisville	Louisville, Ky.	Sun 3/1/2020 6:00 PM	Sun 3/1/2020 8:00 PM
VTAA Tidewater Chapter Meeting	Keagan's Towncenter	Tue 3/3/2020 6:00 PM	Tue 3/3/2020 8:00 PM
Virginia Tech Men's Basketball vs Clemson	VT	Wed 3/4/2020 7:00 PM	Wed 3/4/2020 9:00 PM
VT vs ND Basketball Game Watching Party	CP Shuckers	Sat 3/7/2020 12:00 AM	Sun 3/8/2020 12:00 AM
Virginia Tech Men's Basketball vs ACC Tournament	Greensboro, N.C.	Tue 3/10/2020 12:00 AM	Sat 3/14/2020 12:00 AM
Young Alumni Event	Wasserhund	Thu 3/12/2020 5:30 PM	Thu 3/12/2020 7:30 PM
The Big Event	TBD	Sat 4/4/2020 9:00 AM	Sat 4/4/2020 12:00 PM
VTAA Tidewater Chapter Meeting	Keagan's Towncenter	Tue 4/7/2020 6:00 PM	Tue 4/7/2020 8:00 PM
April 16th Candlelight Vigil	VT AREC	Thu 4/16/2020 7:00 PM	Thu 4/16/2020 8:00 PM
Hokie Happy Hour	TBD	Thu 4/23/2020 5:30 PM	Thu 4/23/2020 7:30 PM
VTAA Tidewater Scholarship App Deadline		Fri 5/1/2020 12:00 AM	Sat 5/2/2020 12:00 AM
VTAA Tidewater Scholarship Application Review		Sun 5/3/2020 12:00 AM	Mon 5/18/2020 12:00 AM
VTAA Tidewater Chapter Meeting	Keagan's Towncenter	Tue 5/5/2020 6:00 PM	Tue 5/5/2020 8:00 PM
Tidewater Chapter New Hokie Welcome Event	TBD	Sat 5/9/2020 12:00 PM	Sat 5/9/2020 3:00 PM
Hokie Happy Hour - Welcome to Summer	Chicks	Thu 5/14/2020 5:30 PM	Thu 5/14/2020 7:30 PM
VTAA Tidewater Scholarship Interview Notification		Sun 5/17/2020 12:00 AM	Mon 5/18/2020 12:00 AM
VTAA Tidewater Scholarship Invterviews	TBD	Wed 5/20/2020 6:00 PM	Wed 5/20/2020 9:00 PM
VTAA Tidewater Scholarship Invterviews	TBD	Thu 5/21/2020 6:00 PM	Thu 5/21/2020 9:00 PM