

**RUTGERS EXCELLENCE IN ALUMNI LEADERSHIP**  
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# Strategic Planning Workshop From Vision to Action

**Mike Rutkowski**, Director of Alumni Engagement for New Brunswick Academic Units

**Dr. Marilyn Gonyo**, President of the Graduate School of Education Alumni Association and the Rutgers Club



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# Agenda

- Define the organization and purpose
- Action planning - align activity with priority
- Strategic planning outlined
- Planning activity

# Types of chartered groups

- **Academic groups** – based on the interests of alumni who wish to connect and continue activity with the school from where they graduate
- **Interest groups** – based on the interests of alumni from a related student group or general interest inspired by alumni
- **Regional groups** – based on alumni that live or work within a defined region and wish to connect
- **Workplace groups** – based on alumni that wish to connect at their workplace

# Defining purpose of your group

## Bylaws of the organization

- Define the primary characteristics of the organization
- Serve as the fundamental instrument for your organization
- Prescribe how the organization functions
- Require previous notice to the members and the vote of a specified majority
- State your purpose, mission statement

# What is Strategic Action Planning?

- **Strategic planning** is a process in which organizational leaders determine their vision for the future, and identify goals and objectives for the organization. The process should establish the sequence for the goals so that the organization is enabled to reach its stated vision.
- An **action plan** is a document that lists **what** steps must be taken in order to achieve a specific goal. The purpose of an **action plan** is to clarify **what** resources are required to reach the goal, formulate a timeline for **when** specific tasks need to be completed and determine **what** resources are required.

# Strategic Action Planning

- WHO is going to be involved in leadership?
  - Define who should be engaged?
  - Who do we serve at events and programs?
- WHAT do we want to accomplish?
  - What do we do?
  - What is the purpose and end goal of our programs?
- WHEN do we schedule our activities?
- HOW are we going to fund our activities and events?
- SAP = VISION + ACTION

# Align activity with priority

- Test your events against your stated purpose/mission
- Organize the purpose/mission into bullets
- Measure events, programs, communication activity against purpose
- Priorities of the purpose should be fulfilled

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## Align activity with priority

- If your event/program/communication does not match purpose or mission...





# Align activity with priority

Evaluate the Bylaws – what is the mission?

- Has your organization been effective in following its mission?
- How does your board operate?
- Purpose of events, programs communications, and meetings –
  - Connect with your Bylaws
  - Connect with RUAA
  - Connect with the Dean, school and students
  - Connect with alumni where you live
  - Connect with alumni where you work

# Align activity with priority

Evaluate the Budget –

- This is the plan of work
- How it is organized?
- Look at the purpose of your spending
- Event, program and board expenses should meet the organization's purpose

# Align activity with priority

Evaluate the Calendar –

- When do you host events and programs?
- Do they align with priorities of your stakeholders: alumni, students, deans, other groups
  - Did you connect with these constituents in advance?
  - Is the event timing correct and best for the intended constituents
  - Volunteers and participants

# Align activity with priority

Evaluate Leadership –

- How does your board function?
- Is your board representative of your alumni body?
- Succession plan for engaging future leaders
- Evaluate your bylaws for the organization to function efficiently

# Benefits of strategic planning

- Connects volunteers to the organization's purpose and core values
- Inspires open communication among board members
- Prioritizes and clarifies goals where volunteers can determine fit for their participation
- Motivates inactive board volunteers

# Strategic planning – S.O.A.R.

## Strengths Opportunities Aspirations Results

- Positive-focused organizational management activity to:
  - Set priorities
  - Focus energy and resources
  - Strengthen operations
- Volunteers and stakeholders work toward common goals
- Establish agreement around intended outcomes
- Assess and adjust the organization's direction in response to a changing environment

# Strategic planning exercise: S.O.A.R.

- **STRENGTHS**

- What is it best at?
- Proudest recent achievement?
- Competitive strategies?
- What makes your group unique?
- What strengths get results – your alumni group current performance?
- Partners – RUAA, schools, volunteers, students, other groups

# Strategic planning exercise: S.O.A.R.

- **OPPORTUNITIES**

- What does the future hold?
- Environmental assessment – what else is happening?
- Meet our organization's alumni needs and wants
- Engagement with school program
- Engagement with the RUAA, school or other group
- Top 3 opportunities to focus on
- New customers are...



# Strategic planning exercise: S.O.A.R.

- **ASPIRATIONS**
- Who do we want to be?
- What are we passionate about?
- What initiatives support our aspirations?
- How does our board operate (processes)
- Projects
- Programs
- Goals

# Strategic planning exercise: S.O.A.R.

- **RESULTS**
- What are we going to accomplish?
- What do you hope to achieve
- One to three year strategic goals
- Think in broad concepts

# Strategic planning exercise: S.O.A.R.

- Strengths, Opportunities, Aspirations, Results

## Activity

- 5 minutes to identify 2-3 concepts for one aspect of SOAR
  - 2 groups - *Strengths*
  - 2 groups - *Opportunities*
  - 2 groups - *Aspirations*
  - 2 groups - *Results*

# Strategic planning exercise: S.O.A.R.

- Exercise outcomes:
- Identify patterns of answers
- Write a strategic priority using concept of the pattern
- Develop actions to support the strategic priorities

# Results of using S.O.A.R.

- Communicate
  - Engagement
  - Learning
  - Leadership
- 
- Priorities
  - Action
  - Evaluate



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**Questions?**