

VERSION 1.0

UPDATED ON APRIL 20, 2020



2020-2021 STRATEGIC PLAN

EXECUTIVE SUMMARY

VISION

JSUNAA DFW strives to develop connections among alumni and current students while encouraging a passion for Jackson State University that will inspire commitment and promote active involvement with the JSU National Alumni Association.

MISSION

The mission of Jackson State University National Alumni Association, Inc. (JSUNAA) is to participate as a partner with Jackson State University (JSU) in supporting the University's continued success through student recruitment, alumni retention and expansion, financial support, public relations, and community outreach.

VALUES

The foundation of our commitment is expressed in our University's alma mater, "Thee I love". As a partner with Jackson State University, under the umbrella of JSUNAA, our chapter is committed to serving as ambassadors to current and future students, as well as alumni in the Dallas/ Fort Worth area.

We value excellence in the execution of our organization's programs, focusing intently on the recruitment of area students and serving as advocates for educational excellence. We serve as a resource to University alumni, promoting the Tiger Spirit within our community and maintaining an active relationship to the University.

STRATEGIC PRIORITIES

Key activities within the organization support our mission and values to advance the University and the agenda of JSUNAA. Areas of focus include membership, communication, student recruitment, and fundraising.

- Be on one accord.
 - Work collaboratively across the organization to maximize efficiency, resources, participation, and outcomes.
- Serve as effective ambassadors to current and future students and alumni.
 - Center organization activities towards the support and participation of the organization's core audience.
- Operate in excellence with process and procedures towards financial growth
 - Prioritize fiscal health, maintaining high standards for organization operations and practice.

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OVERVIEW

The JSUNAA Dallas/Fort Worth Alumni Chapter Executive Board hosted a series of strategic planning sessions to confirm the vision, mission, and goals for the organization, with an initial time horizon of eighteen months (January 2020 – June 2021) and an ultimate focus towards the next five years.

This plan documents the Executive Board's insights and identifies key actions leadership will commit to as stewards of the organization. The strategies confirmed by the approval of this document should be seen as a guide for decision-making and a roadmap for achieving the organization's goals.

As conditions change, chapter leaders are encouraged to revisit the plan and continue this administration's thoughtful management of the chapter into the future.

OCTOBER 6, 2019: An Executive Board strategic planning session was held to 'upright' the ship. During the session, the Board completed a visioning exercise, reviewed the organization's mission, identified geographic areas of influence, and completed a SWOT (strengths, weaknesses, opportunities, and threats) exercise.

The session concluded with the identification of initial priorities for membership, the organization, and future activities. The findings of this session were posted for membership review during the October meeting.

NOVEMBER 10, 2019 A second strategic planning session was held to confirm priorities and draft leadership actions supporting identified goals.

Members attending the November meeting were asked to affirm the Executive Board's efforts by commenting on recommendations displayed around the room.

DECEMBER 8, 2019 A third strategic planning session was held to confirm priorities, draft program actions supporting identified goals, and to create a proposed budget.

Members attending the December meeting were asked to participate in discussions by providing their insight into proposed program actions.

DECEMBER 20, 2019 The 2020-2021 Strategic Plan was drafted, along with next steps providing recommendations to position the Chapter and its membership for success over the next five years and beyond.

The Strategic Plan was confirmed by the chapter on [REDACTED].

LEADERSHIP

	OBJECTIVES	KEY ACTIONS	<u>LEAD</u> PARTNER	BUDGET	START DATE	END DATE	TARGET AUDIENCE
Goal: Be On One Accord							
1	Operate in excellence with process and procedures	Put together and use annual budget	Larry H. Bender/ Marquita Miller	\$0	Nov. 11, 2019	Nov. 30, 2019	Executive Board
2	Establish expectations to create accountability for leaders	Outline and orient expectations at upcoming monthly board meeting	Andrea Thompson Powell/ Willard Hart	\$0	Nov. 11, 2019	Nov. 30, 2019	Executive Board
3	Enable easier and timely reporting from committee chairs	Create committee report forms to document monthly activities	Rahnesha Bunch/ Marquita McCullum	\$0	Nov. 11, 2019	Nov. 30, 2019	Executive Board
4	Archive chapter documents	Create an online document repository	Marquita McCullum/ Rahnesha Bunch	\$0	Nov. 11, 2019	Nov. 30, 2019	Executive Board

5	Establish leadership commitments	Outline and orient roles and responsibilities for each officer and committee chair	Larry H. Bender/ Andrea Thompson Powell	\$0	Nov. 11, 2019	Nov. 30, 2019	Executive Board
6	Follow chapter by-laws, Robert's Rules of Order, and other guides for chapter administration and communication.	Identify or establish communication methods for Executive Board, Committees, Members, and others Educate leaders and committee chairs on established communication methods.	Larry H. Bender/ Andrea Thompson Powell/ Marquita McCullum/ Willard Hart	\$0	Nov. 11, 2019	Nov. 30, 2019	Executive Board

ACTIVITIES

Goal: Operate in Excellence Towards Financial Growth

	OBJECTIVES	KEY ACTIONS	<u>LEAD</u> PARTNER	BUDGET	START DATE	END DATE	TARGET AUDIENCE
1	The Black Winemakers Dinner annually	<p>Confirm core event elements (facility, promotion, sponsorships)</p> <p>Establish a fundraising policy to provide seed money for organization programs</p>	<u>Fundraising Committee</u> President, Vice-Presidents, Corresponding Secretary, Membership Committee, Treasurer, Parent/Student Relations Committee	\$0 (Seed money established through fundraising policy)	August 2019	July 12, 2020	Alumni Community Partners Parents of current students and future alumni Area Organizations (i.e. HBCUs)

2	Popcorn Fundraiser	Advertise Pre-Sale Establish promotion schedule, after initial production begins Establish a fundraising policy to provide seed money for organization programs	Fundraising Committee President, 1 st Vice President, Corresponding Secretary	\$0	December 2019	Ongoing	Alumni Parents of current students and future alumni University supporters
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Goal: Serve as effective ambassadors to current and future students and alumni.

	OBJECTIVES	KEY ACTIONS	<u>LEAD PARTNER</u>	BUDGET	START DATE	END DATE	TARGET AUDIENCE
1	Caravan of Love	Host quarterly activities <ul style="list-style-type: none"> ○ Canned Food Drive ○ Texas Food Bank Volunteer Day ○ Holiday Toy Drive (Ugly Sweater Event) ○ TBD Establish promotion schedule	<u>Community Service Committee</u> <u>Membership Committee</u>	\$0	December 15 (Holiday Toy Drive); Others TBD	Ongoing	Alumni Community Partners Current students and future alumni Parents of current and future alumni
2	College Fairs	Review program and outline needed improvements for 2020-2021	Recruitment Committee	\$0	September 2020	Ongoing	Future alumni Parents of future alumni

3	High School Day	Initiate sponsor solicitation and event promotion to area high schools Develop initial budget for transportation, lodging, and food	<u>Recruitment Committee</u> <u>2nd Vice President, Corresponding Secretary, Finance Committee</u>	\$6,000	January 2020	TBD by JSU	Community Partners Current students and future alumni Parents of current and future alumni
4	Summer Sendoff (Formerly Home for the Holidays. Revisit concept to connect to vision for all pre-alumni activities)	Establish sponsorship or fundraiser for annual giveaway program for current students Establish point of contact source for current students and obtain student and parent information	<u>Parent and Student Relations Committee</u> <u>Recruitment Committee, 2nd Vice President, Fundraising Committee</u>	\$600	January 2020	August 2020	Current students and future alumni Parents of current and future alumni Community Partners
5	Texsippian Cookout (Revisit event concept and requirements)	Confirm core event elements (facility, promotion, sponsorships) Connect with desired partners to reestablish event commitment Establish promotion schedule	<u>Membership Committee</u> <u>President, Treasurer</u>	\$500	January 2020	Summer 2020	Alumni Community Partners Parents of current students and future alumni Area Organizations (i.e. HBCUs)

NEXT STEPS

The 2019 Executive Board should be commended for their efforts to outline a strategy for addressing the needs of the organization and its members. Transitions from one administration to another can be challenging; however, true leaders acknowledge these challenges and solicit the assistance needed to achieve success. This first effort to map the short term direction of the organization will yield tangible long term benefits. As we close this strategic planning series a few closing items are identified below as next steps to advance the organization further.

1. Organizational Structure

- a. Maintain excellence to achieve excellence.
- b. Seek to create life-long members! Remind officers and committee chairs they are the face of the University and the JSUNAA.
- c. Commit to completing the tasks outlined in this strategic plan. Continue to use this tool to outline future desired improvements.
- d. Schedule a regular time to discuss and improve operations, to further refine the abilities of organization leaders and members. Continue to plan strategically!
- e. Confirm and follow processes and procedures.
- f. Conduct budget discussions early and approve a budget on an annual schedule.
- g. Establish a standard point of information for meetings, events, documents, and forms.
- h. Start meetings on time, end on time.
- i. Follow Roberts Rules of Order.
- j. Keep expectations high for officers, committee chairs, partners, and members.
- k. Grow new leaders. Celebrate existing leaders.

2. Membership

- a. Seek to create life-long members! Remind officers and committee chairs they are the face of the University and the JSUNAA. (yes, this item repeats)
- b. Establish a diverse, well-timed, calendar of events, and communicate it often. Consider member interests and schedules, avoiding events during peak seasons (holidays, Cowboy's game, etc.) and planning ahead to allow for maximum participation.
- c. Partner with the Recruitment and Parents/Student Relations Committees to move students (new graduates) to members.
- d. Monitor membership trends (class participation, member retention, etc.) Identify gaps to then propose events and improvements to the Executive Board that might address them.
- e. Work with committee chairs to strategically plan events towards impacting membership trends.

3. Communication

- a. Survey members annually to identify preferences and needs.
- b. Use a variety of communication outlets for alumni, going beyond social media and 'pay-wall' areas for those who may not be current with their dues.
- c. Seek ways to improve organization visibility.
- d. Seek to create life-long members! Remind officers and committee chairs they are the face of the University and the JSUNAA. (yes, this item repeats)

- e. Establish success measures with Committee Chairs to communicate to each target audience.
4. Student Recruitment
- a. Schedule a planning session to establish a comprehensive program for pre-alumni activities.
 - b. Establish point of contact source for current students and obtain student and parent information.
5. Fundraising
- a. Establish a fundraising policy to provide seed money for organization programs
 - b. Create a fundraising package for marketing to sponsors and community partners, in partnership with the Executive Board and/or Corresponding Secretary. Seek outside assistance, if needed.

APPROVAL

The undersigned support this Strategic Plan and commit to implementation, as described.

Print First and Last Name	Title	Signature	Date.
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Partner (Printed Name)	Partner (Signature)		Date.
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Print First and Last Name	Title	Signature	Date.
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APPENDIX A: EXECUTIVE BOARD INSIGHTS

TARGET AUDIENCES

Board members were asked to reflect on the organization's mission and identify primary audiences for chapter programs, activities, and services. Attendees identified three primary audiences, with additional considerations that may support growth within each group.

- **Current Students:** The most frequent responses given referred to current or prospective students. A related secondary response included connecting to parents.
- **JSU Alumni in Dallas/Fort Worth:** Responses identified active and inactive alumni as important audiences for the organization.
- **Jackson State University:** Support of the University and its initiatives were identified, with the additional acknowledgement of other large alumni chapters as target audiences.

One response identified faith and community as important audiences for the organization. While this response does not identify a specific target, it does provide an opportunity to explore the values of the organization as it pursues its mission. Values express core beliefs. Conveying values may provide a guide for methods used to connect to each target audience. It may also define the characteristics desired in potential partnerships.

APPENDIX B: VISIONING THEMES AND KEY WORDS

A vision statement is hopeful and positive. It should define who the organization seeks to support and how it should be perceived. Crafting a vision for an organization allows its members to reflect on the past and dream boldly towards the future. It gives direction to the organization's members and may inspire others to join in the effort. Often, just beyond the organization's current abilities, a vision clearly describes what the group is working towards.

Executive Board members identified themes for the development of the chapter vision. The table below links these themes to the Board's aspirations for the Chapter.

Figure 1. Visioning Themes and Aspirations

Theme	Aspirations
Reputation <i>Key Word(s): Premier Choice/Best/Ambassadors</i>	<ul style="list-style-type: none"> • Award-winning • Effective • Source of strength for the University • A driving force in DFW, that sets the tone for other chapters • A lighthouse to other chapters • A roadmap for other chapters (leader) • Great advisors • Influence to the community and other chapters and university family at large
Fiscal Health <i>Key Word(s): Financial Growth</i>	<ul style="list-style-type: none"> • More financially active chapter • Larger operating fund • More donors • Largest donations
Student Recruitment <i>Key Word(s): Robust Enrollment</i>	<ul style="list-style-type: none"> • Higher student enrollment • Higher recruitment • Strong relationship with current students
Membership <i>Key Word(s): Active/Connected</i>	<ul style="list-style-type: none"> • Larger participation • More involved
Other Comments	<ul style="list-style-type: none"> • Identify the reason [for the chapter] • Promote increase [in all aspects of the chapter's work]

Source: Executive Board Strategic Planning Session 1, October 6, 2019

APPENDIX C: AREAS OF INFLUENCE

Executive Board members and members attending the strategic planning session and regular chapter meeting were given an opportunity to map their primary location and the location of alumni they may influence around the Dallas/Fort Worth area. Participants were also asked to identify year of graduation. This information identifies locations for future meetings and activities.

A high level mapping exercise shows chapter leaders are dispersed across the DFW area. Participants were asked to consider how this might impact planning and coordination.

Figure 2. Board Member Location and Year of Graduation

Year of Graduation	Location	Number of Responses
2010-2019	Downtown Dallas	2
2000-2009	Downtown Dallas, Arlington, Forney, Desoto	4
1990-1999	Prosper, McKinney, Fort Worth	3
1980-1989	None	0
1970-1979	Garland	1

Source: Executive Board Strategic Planning Session 1, October 6, 2019

Board members and chapter meeting attendees were asked to identify the location and year of graduation for alumni they were connected to in the Dallas/ Fort Worth area. A high level mapping exercise shows those in attendance are aware of a number of alumni in and around the Dallas area, and may have influence on their participation and support for the chapter.

Figure 3. Alumni Connections by Year of Graduation, in DFW Area

Year of Graduation	Number of Responses
2010-2019	9
2000-2009	20
1990-1999	14
1980-1989	1
1970-1979	1

Source: Executive Board Strategic Planning Session 1, October 6, 2019

APPENDIX D: STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND THREATS

STRENGTHS

- Membership
 - Members who share the history of the DFW chapter
 - Number of alumni
 - Largest chapter
 - Numbers
 - Age makeup
 - Supportive seasoned alumni
 - Engagement and participation from multiple decades/generations
 - Social influencers
- Leadership
 - Board is involved and cares
 - Most awards
 - Increase in membership
 - Consistent meetings
 - Like mindedness
 - Community goals
 - Love of JSU
- Activities
 - Very effective events (Texsippian Cookout, Black Winemakers Dinner)
 - Presence at college fairs

OPPORTUNITIES

- Leadership
 - Better internal controls
 - Better transitioning of roles
 - Bring more members to our meetings to handle the business of the chapter in support of the University
- Activities
 - Fundraisers
 - Fundraising
 - Membership outreach
 - Social aspects
- Partnerships
 - Connection with relevant agencies
 - Parent involvement
- Membership
 - Active alumni
- Public Relations
 - Opportunities to spread our good name

WEAKNESSES

- Leadership
 - Structural budget
 - Lack of systems
 - Lack of process/procedures
 - Meeting attendance/location
 - Dependent on past
 - Complacency with current achievement
 - Cliques
 - Personal disputes
 - Politics
 - Communication of policy and procedures
 - No exit plan
 - No incoming plan
 - No budget
 - Information isn't stored
- Membership
 - I don't see people I went to school with at the alumni meetings ('92, '93, etc.)

THREATS

- Leadership
 - One person holds all of the info and its causing us to scramble
 - Individuals acting individually on 'behalf of the chapter'
 - Individuals who are inaccessible to get the job done
 - Financial instability
 - Loyalty to the past leadership
 - Being stuck in old ways
- Membership
 - Lack of participation
 - Low membership
 - Becoming one generation or one geographic part of the Metroplex
 - Lack of involvement
- Partnerships
 - Outsourced third-party vendors

Source: Executive Board Strategic Planning Session 1, October 6, 2019

APPENDIX E: FIVE YEAR GOALS

- Membership
 - Newly active alumni and leadership
 - Better use of alumni skillsets (technology, social media, PR)
 - Giving all alumni members a reason to be active other than money.
 - To continue to be the largest chapter in JSUNAA
 - To have at least 80% of current membership as life members
 - Build a program/pathway to connecting generations of alumni who are in the Metroplex
- Leadership
 - Smooth transition
 - Sturdy foundation
 - An effective transition plan
 - To be a chapter of educational, social, community, and financial influence
 - To set the standard for all chapters and the University
- Activities
 - More fundraising income
 - Multiple established fundraisers
 - To increase our student base by 10% each year and commit to reaching student base of 200 each year
 - To have the ability to sponsor local events without breaking the bank
- Partnerships
 - Corporate partnerships
 - Build relationships with corporate/business givers so they underwrite the Chapter's biggest activities

Source: Executive Board Strategic Planning Session 1, October 6, 2019

APPENDIX F: PRIORITIZATION EXERCISE

PRIORITIES (IN NO PARTICULAR ORDER)

- Be great and effective ambassadors to current and future students and alumni (*leadership*)
- Establish and adhere to a budget (*leadership*)
- To operate in excellence with process and procedures with financial growth (*leadership*)
- Sponsor a bus of students to high school day annually (*activities*)
- Create a mentoring program to build leadership and facilitation skills of active alumni (*activities/partnership*)
- Have at least one membership retention event quarterly (*membership*)

ADDITIONAL ACTIVITIES

- Increase DFW student enrollment
- Connect with DFW alumni
- Increase fundraising income
- To have financially active alumni, core sponsors, and strong student enrollment at JSU
- Increase the operating funds
- Fundraising
- Active members
- Financial growth
- Increase inactive members
- Succession planning
- Increase enrollment
- Increase alumni involvement by being more hands on
- Increase local alumni membership
- Increase JSU Student enrollment from DFW area
- Increase local alumni association awareness in the community
- Connect to and support JSU students from DFW with time, treasure, and mentoring
- Create a database for decades/support base who can help use with inclusive for all members
- Operate within a budget
- Attend college fairs to promote JSU and recruit students
- To continue to break records with membership
- Teach and provide opportunities for alumni to support the chapter financially and with their time and talents

Source: Executive Board Strategic Planning Session 1, October 6, 2019

APPENDIX G: GOAL SETTING EXERCISE

ACTIVITIES (IN NO PARTICULAR ORDER)

- Multipurpose
- (Supports) National Agenda (membership, fundraising, service, recruitment)
- Network
- Involvement in community
- Relationships (corporate, vendors)
- Sponsorships
- Messaging
 - (Establish) templates
 - Professional
 - Documentation
 - (Update) website
- Define a participation policy

APPENDIX H: STRATEGIC PLANNING AGENDA, SESSION 1

Agenda

**Jackson State University Alumni Association
2019 Executive Board Strategic Planning Session**

Sunday, October 6, 2019

2:00 p.m. – 3:30 p.m.

1. Introductions – Name/Hometown/Graduation Year(s)/Major/Current Town/Past or Present Role(s) in the Organization (5 minutes)
2. Visioning Exercise (10 minutes)
3. Mission (5 minutes)
 - a. JSUNAA/JSUDFW - The mission of Jackson State University National Alumni Association, Inc. is to participate as a partner with the University in supporting the University's continued success through student recruitment, alumni retention and expansion, financial support, public relations and community outreach.
 - b. Have we been on mission?
4. SWOT Exercise – Where are we today? (15 minutes)
5. Goals (20 minutes)
 - a. In the next 18 months?
 - b. In 5 years?
6. Priorities Exercise (10 minutes)
 - a. This fiscal year?
 - b. In 5 years?
7. Bringing the Plan Together – Keep it Simple! (20 minutes)
 - a. Key Strategic Actions
 - b. Required Resources (People, Money, Time)
 - c. What are our barriers?
8. Next Steps (Part II) (5 minutes)
 - a. Share the Plan
 - b. Measure Your Actions
 - c. Evaluation Plan
 - d. What Equals Success?
 - e. Celebrate!

APPENDIX I: STRATEGIC PLANNING AGENDA, SESSION 2

Agenda

**Jackson State University Alumni Association
2019 Executive Board Strategic Planning Session**

Sunday, November 3, 2019

2:00 p.m. – 3:30 p.m.

1. Opening by Chapter President (5 minutes)
2. Recap of October 2019 Planning Session (20 minutes)
 - a. Review of Session Feedback
 - b. Establishing a Vision
3. Bringing the Plan Together – Keep it Simple! (60 minutes)
 - a. Key Strategic Actions
 - b. Required Resources (People, Money, Time)
 - c. What are our barriers?
 - d. What equals success?
4. Wrap Up (5 minutes)
 - a. Sharing the Plan
 - b. Measure Your Actions
 - c. Evaluation Plan
 - d. Celebrate!

APPENDIX J: STRATEGIC PLANNING AGENDA, SESSION 3

Agenda

**Jackson State University Alumni Association
2019 Executive Board Strategic Planning Session**

Sunday, December 6, 2019

2:00 p.m. – 3:30 p.m.

1. Opening by Chapter President (5 minutes)

2. Establishing a Vision (25 minutes)

3. Recap of November 2019 Planning Session (10 minutes)
 - a. What was accomplished?
 - b. How can we advance outstanding items? (Barriers)

4. Bringing the Plan Together (continued) – Keep it Simple! (50 minutes)
 - a. Key Strategic Actions (Activities/Membership)
 - b. Required Resources (People, Money, Time)

5. Wrap Up
 - a. Measure Your Actions – What equals success?
 - b. Sharing the Plan – January 2020
 - c. Checking In: Evaluation Plan – May 2020
 - d. Celebrate! – June 2020