

Creating a Five-Year Class Plan

A Resource for Class Officers

What?

- Create Five-Year Class Plan
- Include Goals and Action Steps
- The five-year period culminates with your next Reunion
- In creating plan, class leaders will take into account class traditions

Why?

- Class leaders should plan for what they should be doing in years other than the one leading up to Reunion
- Creating a Five-Year Plan will increase class participation in events and giving
- Having an active schedule of class activities, especially in non-Reunion years, broadens the base of alumnae volunteers

Who?

- Class officers will create a Five-Year Plan, with the support and suggestions of other class volunteers
- Class officers will be assisted as needed by the Classes and Reunions Committee, Alumnae Association staff, and the Development Office (head class agents)
- Class officers will work to recruit additional class volunteers as necessary

When?

- Class officers will hold a class officer meeting at least once a year in a manner acceptable to all officers (e.g. in person, by teleconference, online chats)
- During Reunion Year (Year Five of Plan), class officers should plan to hold more frequent meetings

Where?

- The Five-Year Plan process begins at Alumnae Council, held for new officers on campus in the fall during Year One of the Cycle
- The Association can assist class officers in scheduling in-person meetings on campus or in arranging teleconferences

Snapshot of Five-Year Goals (Sample) Class of 19XX

Year One Class Goals	Year Two Class Goals	Year Three Class Goals	Year Four Class Goals	Year Five Class Goals
<ul style="list-style-type: none"> ■ Encourage Classmates to keep up interest and involvement in this post-Reunion year ■ Ensure that transition from former class board is complete, including the transfer of the treasury ■ Celebrate and communicate highlights of the past Reunion ■ Plan a mini-reunion in Los Angeles area with a goal of 30 classmates in attendance ■ Review Alumnae Annual Fund giving results and encourage more participation ■ Create class website 	<ul style="list-style-type: none"> ■ Plan a mini-reunion in another city ■ Encourage classmates to send in updates for the <i>Quarterly</i> ■ Continue to update and maintain website 	<ul style="list-style-type: none"> ■ Continue to encourage new participation in the Alumnae Annual Fund ■ Reach out to inactive classmates to generate broader volunteer base 	<ul style="list-style-type: none"> ■ Start to gather Reunion Team ■ Find a Reunion Chair if was not selected at previous reunion ■ Attend Reunion Planning Workshop held on campus in the fall ■ Set reunion participation and dollar goals for class contribution to Alumnae Annual Fund ■ Have Nominating Committee start inquiring about potential candidates for class offices 	<ul style="list-style-type: none"> ■ Complete Reunion Team ■ Update website often to include Reunion information ■ Strive for significant increases in attendance at reunion ■ Personally reach out to as many classmates as possible ■ Have a great Reunion!

Year One (Sample)

<p>Class Goals:</p> <ul style="list-style-type: none"> ■ Encourage Classmates to keep up interest and involvement in this post-Reunion year ■ Ensure that transition from former class board is complete, including the transfer of the treasury ■ Celebrate and communicate highlights of the past Reunion ■ Plan a mini-reunion in Los Angeles area with a goal of 30 classmates in attendance ■ Review Alumnae Annual Fund giving results and encourage more participation ■ Create class website 	<p>Action Steps:</p> <p>All Officers:</p> <ul style="list-style-type: none"> ■ Gather Reunion stories and pictures to send out post-reunion letter ■ Communicate with corresponding out-going officers to effect a smooth transfer ■ Review list of attendees at the past reunion to see if there are any potential new volunteers for the class <p>President:</p> <ul style="list-style-type: none"> ■ Identify potential host for mini-reunion, help plan event, attend (if possible) ■ Review class treasury ■ Appoint webmaster, if position not filled otherwise <p>Vice President:</p> <ul style="list-style-type: none"> ■ Help plan mini-reunion; attend mini-reunion, if possible <p>Treasurer:</p> <ul style="list-style-type: none"> ■ Contact outgoing treasurer to effect transfer ■ Discuss potential budget for mini-reunion <p>Head Class Agent:</p> <ul style="list-style-type: none"> ■ Review class giving history ■ Work with Development Office on participation strategies
<p>Association Tasks:</p> <ul style="list-style-type: none"> ■ Class president, vice-president, and treasurer attend Alumnae Council in Fall ■ Head Class Agents attend Development training in Fall ■ Outgoing treasurer to submit Form C to Association (September 2004) ■ Send out Annual Letter to class ■ Submit class notes to <i>Quarterly</i> (four times a year) 	<p>Action Steps:</p> <p>President:</p> <ul style="list-style-type: none"> ■ Attend Alumnae Council ■ Send out Annual Class Letter <p>Vice President:</p> <ul style="list-style-type: none"> ■ Attend Alumnae Council <p>Treasurer:</p> <ul style="list-style-type: none"> ■ Attend Alumnae Council ■ Comply with Association treasury guidelines <p>Head Class Agents:</p> <ul style="list-style-type: none"> ■ Attend Development Training ■ Work with Development Office on fundraising goals <p>Scribe:</p> <ul style="list-style-type: none"> ■ Gather information for Class Notes from wide variety of classmates

Year One

<p>Class Goals:</p>	<p>Action Steps: All Officers:</p> <p>President:</p> <p>Vice President:</p> <p>Treasurer:</p> <p>Head Class Agent:</p> <p>Scribe:</p> <p>Other Officers:</p>
<p>Association Tasks:</p> <ul style="list-style-type: none">▪ Class president, vice-president, and treasurer attend Alumnae Council in Fall▪ Head Class Agents attend Development training in Fall▪ Outgoing treasurer to submit Form C to Association (September)▪ Send out Annual Letter to class▪ Submit class notes to <i>Quarterly</i> (four times a year)	<p>Action Steps:</p> <p>President:</p> <ul style="list-style-type: none">▪ Attend Alumnae Council▪ Send out Annual Class Letter <p>Vice President:</p> <ul style="list-style-type: none">▪ Attend Alumnae Council <p>Treasurer:</p> <ul style="list-style-type: none">▪ Attend Alumnae Council▪ Comply with Association treasury guidelines <p>Head Class Agents:</p> <ul style="list-style-type: none">▪ Attend Development Training▪ Work with Development Office on fundraising goals <p>Scribe:</p> <ul style="list-style-type: none">▪ Gather information for Class Notes from wide variety of classmates

Year Two

<p>Class Goals:</p>	<p>Action Steps: All Officers:</p> <p>President:</p> <p>Vice President:</p> <p>Treasurer:</p> <p>Head Class Agent:</p> <p>Scribe:</p> <p>Other Officers:</p>
<p>Association Tasks:</p> <ul style="list-style-type: none">▪ Send out Annual Letter to class▪ Hold annual class officer meeting▪ Submit Form C to Association (September)▪ Submit class notes to <i>Quarterly</i> (four times a year)▪ Encourage participation in Alumnae Annual Fund	<p>Action Steps: President:</p> <ul style="list-style-type: none">▪ Send out Annual Class Letter▪ Arrange class officer meeting <p>Vice President:</p> <p>Treasurer:</p> <ul style="list-style-type: none">▪ Submit Form C – due September 30 <p>Head Class Agents:</p> <ul style="list-style-type: none">▪ Work with Development Office on fundraising goals <p>Scribe:</p> <ul style="list-style-type: none">▪ Gather information for Class Notes from wide variety of classmates

Year Three

<p>Class Goals:</p>	<p>Action Steps: All Officers:</p> <p>President:</p> <p>Vice President:</p> <p>Treasurer:</p> <p>Head Class Agent:</p> <p>Scribe:</p> <p>Other Officers:</p>
<p>Association Tasks:</p> <ul style="list-style-type: none">▪ Send out Annual Class letter▪ Hold annual class officer meeting▪ Submit Form C to Association▪ Submit class notes to <i>Quarterly</i> (four times a year)▪ Encourage participation in Alumnae Annual Fund	<p>Action Steps: President:</p> <ul style="list-style-type: none">▪ Send out Annual Class Letter▪ Arrange class officer meeting <p>Vice President:</p> <p>Treasurer:</p> <ul style="list-style-type: none">▪ Submit Form C - due September 30 <p>Head Class Agents:</p> <ul style="list-style-type: none">▪ Work with Development Office on fundraising goals <p>Scribe:</p> <ul style="list-style-type: none">▪ Gather information for Class Notes from wide variety of classmates

Year Four

<p>Class Goals:</p>	<p>Action Steps: All Officers:</p> <p>President:</p> <p>Vice President:</p> <p>Treasurer:</p> <p>Head Class Agent:</p> <p>Scribe:</p> <p>Other Officers:</p>
<p>Association Tasks:</p> <ul style="list-style-type: none"> ▪ Class president, vice-president, and reunion chair attend Reunion Planning Workshop in Fall ▪ Head Class Agents/Reunion gift Chairs attend Development training in Fall ▪ Core Reunion Team in place ▪ Nominating Committee in place ▪ Submit Form C to Association ▪ Send out Annual Letter to class ▪ Submit class notes to <i>Quarterly</i> (four times a year) ▪ Encourage Alumnae Annual Fund participation 	<p>Action Steps:</p> <p>President:</p> <ul style="list-style-type: none"> ▪ Send out Annual Class Letter ▪ Arrange one or more class officer meetings ▪ Attend Reunion Planning Workshop ▪ Name Reunion Chair, if not done at previous reunion ▪ Name two additional members to Nominating Committee ▪ Appoint Nominating Committee Chair from three original Committee members <p>Vice President:</p> <ul style="list-style-type: none"> ▪ Attend Reunion Planning Workshop <p>Treasurer:</p> <ul style="list-style-type: none"> ▪ Submit Form C - due September 30 <p>Head Class Agents:</p> <ul style="list-style-type: none"> ▪ Attend Reunion Gift Chair Training <p>Scribe:</p> <ul style="list-style-type: none"> ▪ Gather information for Class Notes from wide variety of classmates <p>Reunion Chair:</p> <ul style="list-style-type: none"> ▪ Recruit volunteers to chair sub-committees ▪ Reach out to a wide and varied group of classmates <p>Nominating Chair:</p> <ul style="list-style-type: none"> ▪ Arrange for committee meeting to discuss potential list of candidates for new slate of officers and procedures for selection of slate

Year Five

<p>Class Goals:</p>	<p>Action Steps: All Officers:</p> <p>President:</p> <p>Vice President:</p> <p>Treasurer:</p> <p>Head Class Agent:</p> <p>Scribe:</p> <p>Other Officers:</p>
<p>Association Tasks:</p> <ul style="list-style-type: none"> ▪ Send out Fall Reunion Letter to class (due mid-September) ▪ Send our Winter Reunion Letter to class (due mid-January) ▪ Prepare for transition to new class board ▪ Submit Form C to Association ▪ Complete Reunion Planning and Development Teams ▪ Submit class notes to <i>Quarterly</i> (four times a year) 	<p>Action Steps:</p> <p>President:</p> <ul style="list-style-type: none"> ▪ Arrange for class officer meeting(s) ▪ Assist Reunion Planning Chair, as needed ▪ Prepare any class notes to be handed over to incoming president at Reunion <p>Vice President:</p> <ul style="list-style-type: none"> ▪ Assist Reunion Planning Chair, as needed <p>Treasurer:</p> <ul style="list-style-type: none"> ▪ Submit Form C - due September 30 ▪ Assist Reunion Planning Chair, as needed ▪ Prepare class treasury information to be handed over to incoming treasurer <p>Reunion Gift Chair:</p> <ul style="list-style-type: none"> ▪ Complete reunion gift calling team ▪ Attend Development Training in fall with other reunion gift callers <p>Scribe:</p> <ul style="list-style-type: none"> ▪ Gather information for Class Notes from wide variety of classmates <p>Reunion Chair:</p> <ul style="list-style-type: none"> ▪ Complete reunion planning team ▪ Prepare Fall and Winter Reunion Letters to classmates ▪ Work with team to ensure a great reunion for all classmates <p>Nominating Committee Chair:</p> <ul style="list-style-type: none"> ▪ Complete selection of potential candidates for new class board ▪ Present final slate of officers at the class meeting at Reunion