

UCDAVIS

CAL AGGIE ALUMNI ASSOCIATION

African and African American Alumni Association

University of California, Davis • One Shields Avenue • Davis, California 95616

STRATEGIC PLAN

CREATING THE FUTURE

REV 6/2006

STRATEGIC PLAN 2004-2005

CREATING THE FUTURE

This strategic plan is the culmination of an 18-month process. The real work was done by the full board during its 2003 annual meeting. The board, after many hours of deliberation and decision making, set out 11 goals for creating the future of the University of California, Davis (UCD), African and African American Alumni Association (5A). The Strategic Planning Sub-committee then took the 11 goals and began the work of “unpacking” the 5A Board’s vision of the future. The principal tool used by the sub-committee is the time tested “SWOT” analysis.

The 11 goals include:

- Developing an annual budget
- Creating an endowment to fund an academic chair
- Creating a scholarship fund
- Developing a fundraising plan
- Studying the feasibility of hiring an Executive Director
- Studying the feasibility of opening a headquarters office (Not in Final Version)
- Developing a newsletter
- Increasing membership in the 5A
- Increasing enrollment of African & African American students at UCD
- Securing a seat on the UCD Alumni Association Board of Directors
- Securing appointments to relevant UCD Alumni Association sub-committees

The work of the sub-committee was conducted in fits and starts due to the heavy personal and professional demands on the time of the sub-committee membership. The following are the fruits of its labors.

What will remain constant is our unconditional commitment to increasing the number of African and African-Americans students attending UCD.

PREPARED BY

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INTRODUCTION

This strategic plan is a blue print for creating the future of the 5A, a Chapter of the Cal Aggie Alumni Association (CAAA). Just over 3,000 African & African Americans have attended or graduated from UCD since the opening of the College of Letters and Sciences in 1959.

Many former students have gone on to distinguish themselves in various professional fields and personal endeavors. The education and training they received at UCD has prepared them for their achievements.

Beginning in the socially turbulent 1960s and 1970s, UCD was able to gradually increase the numbers of African & African Americans students admitted. Although the UCD campus has become significantly more ethnically diverse since the 1960s, the number of African and African American students admitted in recent years has fallen dramatically and remains dismally and unacceptably low.

The sole purpose of the 5A Chapter is to increase the number of Africans and African Americans attending and graduating from UCD. This is its unconditional commitment.

The 5A Board reserves the right to change this plan from time to time to reflect changes in our working environment and to ensure the Strategic Plan is consistent with the goals and objectives of the Board.

VISION

CREATING THE FUTURE

Our vision for the future is not new or even original.

The author and playwright Langston Hughes once asked the question about what happens to “a dream deferred?”

We have come to believe that achieving a higher education is the light that illuminates the universe. We have also come to believe that once a student has received the gift of light, there are no limits to the dreams that could be fulfilled.

GOALS & OBJECTIVES

GOAL **Annual Budget**

OBJECTIVES

1. Appoint finance committee.
2. Establish annual budget process.
3. Set annual budget.

Goal

To adopt the following objectives to develop and manage an annual budget

Objective: Appoint a Finance Committee

- Delineate responsibilities of the Finance Committee
- Determine the number of members to serve and term limit
- Secure volunteers among those currently serving on the Board
- Require President to select the initial members
- Require President to appoint a rotating Chair

Objective: Establish an Annual Budget Process

The annual budget process will provide a structure, uniform approach and documentation to assess requests to secure or share funding for 5A sponsored or supported activities or events. The budget process will require that requests be in writing. Applications for funding are submitted to the 5A Board President for consideration. Requests will include pertinent information about the event or activity, benefit to UCD and the name of the appropriate contact person. A tailored application form will provide the format to secure information necessary for Board consideration. Respective Board members also will use the same form for events or activities initiated by the Board. Current budget information will be made available to the Board to assess impact of decisions on the 5A Chapter budget.

Entry on the 5A master budget document will be the mechanism by which CAAA earmarks funds for payment and disbursement. The disposition of funding requests will be noted in the Board minutes and communicated by the President to the appropriate event or activity contact person. In coordination with the President, the Finance Officer will track funding requests to final disposition and record accordingly. Approved funding requests are entered on the master budget document as encumbrances.

Objective: Set an Annual Budget

The 5A annual budget is set by the CAAA. CAAA allocates \$1000.00 as a base budget. The budget is increased in relationship to the number of dues paying members represented by the 5A chapter. In the future, CAAA also may consider increasing 5A's budget using activity factor because of the high activity level of the 5A membership.

It is the responsibility of 5A to manage its budget and stay within its spending authority. The CAAA is responsible the disbursement of funds earmarked and approved by the 5A.

The annual budget for the new fiscal year is usually available in May. While the opportunity for supplemental funding may be available, such funding will not be incorporated into the initial annual budget. However, once approved, the supplemental funding will become an augmentation to the annual budget. Supplemental funding such as grants generally involve elaborate application and selection processes with no assurance of approval. However, the 5A budget process can accommodate anticipated supplemental funding. A notation on the master budget spreadsheet would indicate that these events or activities are subject to supplemental funding. Events and activities subject to supplemental funding will be generally assigned lower priorities.

Operating expenses include rental of space for Board meetings, purchase of refreshments and business cards. Operating expenses for the current fiscal and future projections will be reviewed and adjusted on an annual basis by the Board.

If anticipated income is expected to fund or help fund an event or activity and generate monies to supplement 5A budget, shortfalls beyond the spending authority for the event or activity is the responsibility of the Board. The Board, in conjunction with CAAA, will determine how to address the deficiency.

The master budget document will be used to reflect budget detail, such as annual budget, expenses, supplemental funding, anticipated income, events and activities, spending authority, donations and encumbrances. The master document will be updated continuously as decisions are made by the Board and expense input received from CAAA. This budget document will be reconciled with the CAAA and distributed on a monthly basis to 5A Board members.

GOAL Endowment

OBJECTIVES

1. Establish department chair.
2. Develop funding source.
3. Develop chair selection process.

GOAL Scholarship

OBJECTIVES

1. Establish scholarship committee
2. Name Scholarship.
3. Establish scholarship criteria.
4. Establish scholarship selection process.
5. Select first awardees.

This area is intended for future development and consideration by the Board as funds become available and activities are implemented to support these goals.

The Board reserves the right to adopt, when appropriate, processes and procedures for making this goal a reality.

GOAL Fund Raising

OBJECTIVES

1. Appoint a revenue enhancement committee.
2. Develop a fund raising strategic plan.

Goal:

To raise additional capital for the 5A to accomplish its many goals and objectives identified in its strategic plan.

Objective: Under the strategic plan of 5A, enhance the annual budget allocation provided by the CAAA.

Objective: The 5A Board will appoint a revenue enhancement committee.

Budgetary Need, Qualifier and Disclaimer

The annual 5A budget is a formula based figure derived from the number of active dues paying members of African and African American Alumni who join the larger CAAA organization. In recognition that the annual budget allocation from the CAAA will not provide all of the funds necessary to carry out its goals and objectives, the 5A is embarking on an aggressive financing campaign to ensure that an appropriate level of service its constituents can be maintained

The 5A will ensure through its fund raising activities that it will not conflict with supporters and sponsors identified in UCD's long- term strategic plan.

The 5A will work with the CAAA to insure conflicts with UCD do not occur. However, on an event driven basis, sponsorship may come from an entity affiliated with the UCD. In such cases, the 5A will work with both the UCD and the sponsoring entity to ensure a duplication or conflict of interest is held to a minimum.

Strategic Plan of the Revenue Enhancement Committee

The strategic plan for 5A, under revenue enhancement, will be divided between long-range goals and short-term objectives.

Long-range goals and objectives are defined as activities that require large capitalization and extend over the annual budget cycle. Short-term objectives are programs and events that 5A sponsors and are capitalized on an annual basis.

Long-term capitalization goals and objectives include, but are not limited to, the following:

- Establishment of an Endowment Fund
- Provide Student Scholarships for various disciplines
- Membership Brochure for Recruitment and Retention of African & African American Alumni
- 5A Newsletter
- Funding for Community Outreach Projects
- Funding for Staff to ensure the Organization continues as a going concern.
- Special Programs approved by the 5A Board

Short-term objectives are defined as activities to fund annual, on-going events that the 5A sponsors each budget year. These activities include, but are not limited to the following:

- One major educational event as required by the CAAA to maintain status as an active chapter.
- Activities in Support of Black Family Day
- Sponsorship of students participating in the African & African American Graduation Celebration
- Support of various programs that impact the African & African American community which occur on or off campus
- Sponsor of special events with other public and private entities that foster networking, education and scholarship.

The 5A may procure the services of an outside firm or individual who has the ability to put on fund raising activities that support the goals and objectives of the UCD and the CAAA. The services of an event planner will assist 5A with consultant and professional services to accomplish both long-term and short-term goals and objectives set forth in the strategic plan. The 5A will seek underwriters to sponsor specific, event driven functions during a given calendar year. This includes annual support of the graduating class of African & African American students.

The 5A will identify and pursue funding through sources not currently affiliated with the UCD. In this effort, the 5A will seek educational grants and other endowment type funding in keeping with the goals and objectives of UCD.

As part of its public relations to increase membership awareness of its goals and objectives, the 5A Board will develop souvenir and carry materials that can be sold for profit or given away as keepsake items. Items specifically targeted will be designed by UCD and in accordance and cooperation with the UCD Logo and Trademark Department. The 5A will work with UCD approved and licensed vendors to provide those products.

These items include, but are not limited to the following:

- T-Shirts and Tank Tops
- Sweat Shirts and Sweaters
- Baseball Caps and Visors
- Polo Shirts
- Coffee mugs and Glassware
- Writing Pens and Pencils
- African & African American Alumni Pins, Logos and other carry items.

As part of the annual budget process, the Revenue & Enhancement Committee will submit to the 5A for adoption, an annual business plan for the fiscal year. The plan will include the functions and activities that will be implemented to support the 5A.

GOAL Executive Director

OBJECTIVES

1. Appoint special study committee
2. Develop feasibility study.

Goal

To establish and fund a full-time Executive Director position

Objectives:

Appoint a committee with responsibility to develop a feasibility plan to create the position of Executive Director. The position will serve as an in-house staff personnel funded solely by the 5A.

As funding becomes available, the 5A Board will create the position of Executive Director who will serve at the pleasure of the Board. This position will be a full-time staff within the office of the CAAA. CAAA will provide office space and ancillary support for this individual.

Funding for this position will be included in the annual budget appropriation for the Board and included in the annual Budget adoption process.

GOAL Newsletter - Communications

OBJECTIVES

1. Recruit and appoint editor.
2. Develop format and distribution methods.
3. Develop financial budget.
4. Develop publishing schedule.
5. Publish print or electronic media.

Goal: To publish a regular newsletter to enhance communication with members

Objectives:

- ° Recruit and appoint an Editor for the production and implementation of an organization newsletter.
- ° Develop, in coordination with the Editor, a newsletter format that is suited for use in both an electronic format and a mail-ready hard copy form.
- ° Develop, in coordination with the Chair of the Finance Committee, a viable financial budget that will enable the production and distribution of the organization newsletter by means of e-mail, electronic list serve, mail carrier service, or the worldwide web.
- ° Establish a publishing schedule for the newsletter that keeps pace with campus and community events and activities relevant to our readers and their interests as members of the 5A. The publishing schedule should be maintained regardless of the methods used to produce and/or distribute the newsletter.
- ° Work in coordination with the Chair of the Membership Committee to ensure that 5A membership lists contain accurate and up-to-date information. Maintaining accurate newsletter mailing lists and e-mail address information can assist this process.

GOAL Membership in 5A

OBJECTIVES

1. Increase membership.
2. Develop 5 year membership recruitment plan.

Goal: To increase membership in the 5A

Objective:

The Membership Chair will maintain active file of current 5A membership and list of all UCD African & African American graduates. Chair will coordinate with CAAA Office email lists and other information on former and current African & African American students at UCD.

The Membership Chair will provide ongoing information to 5A Board on possible community activities and events that may be beneficial to the organization for recruiting new members.

The Membership Chair will provide ongoing information and updates on successful UCD African & African American Alumni to Board. These announcements and mailings will be coordinated with Communications Committee.

The Membership Chair will participate in workshops, seminars and community events to publicize membership recruiting activities for the 5A.

Objective:

Five-Year Membership Plan

YEAR ONE

The Membership Chair will establish with Executive Board an annual membership event for the purpose of recruiting new members from all previous graduating classes from the 1960s to present. This annual event will be planned by the Membership Chair with the Executive Board beginning each year at the Annual Meeting. Membership chair will coordinate activity/table for African & African American graduation event. The Membership Chair will facilitate an activity which involves former graduates and current African & African American students for Black Family Day event. The Membership Chair will coordinate with Board Members to establish quarterly informal "mixers" for bringing together 5A members and recruits.

YEAR TWO

The Membership Chair will coordinate two annual membership events with the Executive Board beginning at the Annual Meeting. One event will be planned for the fall and one for the spring for the purpose of expanding the scope of membership recruiting efforts. The Membership Chair will coordinate activity/table for Black Graduation event and Black Family Day. The Membership Chair will coordinate quarterly "Social Mixers".

YEAR THREE

The Membership Chair will coordinate two annual membership events with the Executive Board beginning at the Annual Meeting. The Membership Committee will meet to develop plan to expand membership events to all of California's regions for year four. The Membership Chair will coordinate activity/table for Black Graduation event and Black Family Day. The Membership Chair will coordinate quarterly "Social Mixers".

YEAR FOUR

The Membership Chair will coordinate annual membership events with Executive Board beginning at Annual Meeting. Membership Committee will meet to develop focused membership recruiting events i.e. recent graduate, Southern California Alumni, medical/law school graduates, in conjunction with California Black Chamber of Commerce, etc. for year five. The Membership Chair will coordinate activity/table for Black Graduation event and Black Family Day. Membership Chair will coordinate quarterly "Social Mixers".

YEAR FIVE

The Membership Chair will coordinate annual membership events with Executive Board beginning at Annual Meeting. Membership Chair will coordinate activity/table for Black Graduation event and Black Family Day. The Membership Chair will coordinate quarterly "Social Mixers".

GOAL Increase African & African American enrollment at UCD

OBJECTIVES

1. Develop “who we are” handout.
2. Develop one year promotional plan.
3. Develop 5 year promotional plan.

Goal

To establish a community outreach recruitment program to increase the number of Africans and African-Americans attending and graduating from UCD. The purpose of outreach program of the 5A is to increase the visibility of UCD to encourage more African and African Americans to apply and attend UCD.

Objective: “Who we are” Handout. Develop an informational handout about UCD to be available at campus and community events.

Objective: Develop one year and five year promotional plans including but not limited to the following strategies:

Adopt a school program

Work with and adopt schools in the area to expose them to UCD and show what UCD has to offer. The Board will approve programs and or activities directed towards specific schools to bring visibility to the University and its programs.

Work with Undergraduate Admissions

African Alumni members can become a part of the Undergraduate Admission Advising team. Members of this team will go out to schools and community organizations in the fall to recruit students to apply to UC Davis.

Work with Undergraduate Admissions/Cal Aggie Alumni Association

Once an applicant has been admitted, the 5A will host receptions to help students find out more information on UCD and hopefully decide to attend UCD. These receptions after the acceptance period will enhance the UCD’s ability to get more African Americans to attend.

Work with African American retention coordinators

The Board will implement programs to enhance the learning experience of African and African American students through UCD departments such as the African American Studies department, the Student Recruitment and Retention and Cross Cultural Center. This would enable 5A to connect with students/organizations on campus.

Work with African American community, Churches and Fraternal organizations

The Board will network with various community organizations to generate interest in UCD and work to identify high school and community college students who possess the academic background and personal attributed for admission to UCD.

Work with the African/African American Graduation Celebration Committee

Work with the African/African American Graduation committee to enable the 5A to connect with students about joining the 5A as they depart the campus.

GOAL **Seat on UCD Alumni Association Board of Directors**

- OBJECTIVES**
1. Determine membership process.
 2. Recruit association representative.
 3. Develop reporting tools.

GOAL **CAAA Sub-committee Membership**

- OBJECTIVES**
1. Determine organizational and political structure.
 2. Determine budget process.
 3. Identify potential sources of financial assistance.
 4. Develop reporting tools.

Goal

Adopt a process to have a member of the 5A Board sit on the CAAA Board and its Membership Sub-Committee:

Objective

Develop a process whereby members of the 5A Board are recruited to serve on the CAAA Board in various capacities to report on the organizational, political and budgetary activities of the organization.

The 5A Board will maintain an up-to-date list of qualified nominees for membership on the CAAA and its committees. The following options will be used to develop the list:

- Add a section to the 5A Board member application for candidates to express interest in serving on one of the five CAAA Board committees.
- At the 5A annual meeting, update current and vacating Board member interest regarding serving on the CAAA Board or one of the committees.
- Contact new 5A members to determine interest in serving on one of the CAAA Alumni Board committees.
- The outgoing 5A Board President shall be a nominee for the Chapters Committee.

The President and 5A members of the CAAA Board shall submit a list of qualified nominees to the CAAA Nominating Committee and the Executive Director, at the beginning of the fiscal year.

Members of the 5A who also serve on the CAAA Board shall endeavor to become the chair or vice-chair of the CAAA committee on which they serve.

The 5A Board President and members serving on the CAAA Board shall report to the full 5A Board, the status/outcome of the slate, by the second regularly scheduled meeting of the year.