

CREATING A FIVE-YEAR PLAN (A Resource for Class Officers)

WHAT?

- Include goals and action steps on everything from communications to events
- Take into account class traditions
- Culminates with your next Reunion

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 create and execute the Five-year Plan, with the support and suggestions of other class volunteers
- Class officers are assisted as needed by the Classes and Reunion Committee, Alumnae Association staff, and the Office of Advancement (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 conference call, online chats)
- During Reunion Year (Year Five of the Plan), class officers should plan to hold more frequent meetings

WHERE?

- The Five-year Plan process begins at the New Class Officer Training Workshop, held for new officers on campus in the fall during Year One of the Cycle
- The Alumnae Association and the Classes and Reunion Committee can assist class officers by discussing your ideas and the initiatives your class wants to pursue during in-person meetings on campus or by holding teleconferences

Pages 2-9 below are a sample Five-year Plan. A blank version of the plan is provided on pages 11-22.

Snapshot of Five-year Goals **(Sample)** Class of _____

Year One Class Goals	Year Two Class Goals	Year Three Class Goals	Year Four Class Goals	Year Five Class Goals
 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 Mount Holyoke Fund giving results and encourage more participation Create class website Encourage scribe to reach out to the segment of the class via email each quarter 	 Plan a mini-reunion in another city Encourage classmates to send in updates for the <i>Quarterly</i> Continue to update and maintain website Encourage scribe to reach out to a segment of the class via email each quarter 	Continue to encourage new participation in the Mount Holyoke Fund Reach out to inactive classmates to generate broader volunteer base Encourage scribe to reach out to a segment of the class via email each quarter	 Start to gather Reunion Team Find a Reunion Chair if one was not elected at previous reunion Attend Reunion Planning Workshop held on campus in the fall Set reunion participation and dollar goals for class contribution to Mount Holyoke Fund Appoint Nominating Committee Chair and 2 new members of the Nominating Committee. Have Nominating Committee. Have Nominating committee start inquiring about potential candidates for class offices Encourage scribe to reach out to a segment of the class via email each quarter 	 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: July 2012 – June 2013 **(Sample)**

CLASS GOALS:

- 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 Mount Holyoke Fund giving results and encourage more participation
- Create class website
- Encourage scribe to reach out to a segment of the class via email each quarter

ASSOCIATION TASKS:

- Class president and web coordinator attend New Class Officer Training Workshop in fall (and other class officers at class's expense)
- Outgoing treasurer to submit Form C to Association (August 30th)
- Send out Annual Letter to class
- Submit class notes to Quarterly (four times a year)

ACTION STEPS:

All Officers:

- Gather Reunion stories and pictures to send out post-reunion letter
- Communicate with corresponding outgoing 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

President:

- Identify potential host for mini-reunion, help plan event, attend (if possible)
- Review class treasury
- · Appoint a web coordinator, if position was not slated

Vice President:

• Help plan mini-reunion; attend mini-reunion, if possible

Treasurer:

- · Contact outgoing treasurer to effect transfer
- Discuss potential budget for mini-reunion

Head Class Agent:

- Review class giving history
- Work with Office of Advancement on participation strategies

Web Coordinator:

• Create or update class website

ACTION STEPS:

- President:
- Attend New Class Officer Training Workshop on campus
- Send out Annual Class Letter

Vice President:

- Attend New Class Officer Training Workshop if president is unable
- · Offer to assist with class letter

Treasurer:

• Comply with Alumnae Association treasury guidelines

Head Class Agents:

• Work with Office of Advancement on fundraising goals

Scribe:

Gather information for Class Notes from wide variety of classmates

Web Coordinator:

Attend New Class Officer Training

Five-year Plan

RESPONSIBILITIES – EACH YEAR	Pres.	VP	Treas.	Sec'y Scribe	Head Class Agent	Web Coord.	Reunion Chair	Nom. Chair
Collaborate on class letter	X	Х	X	X	X	X	X	Х
Send class letter (Aug & Jan good time)	Х							
Post class letter on website						Х		
Update website each quarter						Х		
Submit Form C to Alumnae Association			Х					
Send copy of Form C to President			Х					
Advise President of bills (for approval)			Х					
E-Mail some classmates each quarter to solicit news for <i>Quarterly</i>				Х				
Submit class notes to Quarterly each quarter				Х				
Set up meeting of Class Board	Х							
Participate in meeting of Class Board	Х	Х	Х	Х	Х	Х	Х	Х
Discuss/Plan Mini-Reunions	Х	Х						
Lead class projects		Х						
Review class giving history					Х			
Work with Office of Advancement on participation strategies					X			
Work with Office of Advancement on fundraising goals					Х			
Send Annual Appeal letter					Х			
Encourage participation in Mount Holyoke Fund	Х	Х	Х	Х	Х	Х	Х	Х

Year One

RESPONSIBILITIES – YEAR ONE	Pres.	VP	Treas.	Sec'y Scribe	Head Class Agent	Web Coord.	Reunion Chair	Nom. Chair
Communicate with your predecessor to ensure smooth Class Board transfer of responsibilities	Х	Х	Х	Х	X	Х	Х	Х
Attend New Class Officer Training Workshop (NCOT) in the fall	Х		Х			Х		
Appoint other officers to attend NCOT if pres/web coordinator can not	Х							
Send out post-Reunion letter	Х						Х	
Ensure that former Treasurer has sent in Form C by August 30			X					
Email some classmates each quarter to solicit news for <i>Quarterly</i>				Х				
Develop/update class website						Х		
Set up class bank account			Х					
Select class agents					Х			
GOALS:								

Year Two

RESPONSIBILITIES – YEAR TWO	Pres.	VP	Treas.	Sec'y Scribe	Head Class Agent	Web Coord.	Reunion Chair	Nom. Chair
Update website each quarter						Х		
Email some classmates each quarter to solicit news for <i>Quarterly</i>				X				
Write annual class letter	X							
GOALS:								

Year Three

RESPONSIBILITIES – YEAR THREE	Pres.	VP	Treas.	Sec'y Scribe	Head Class Agent	Web Coord.	Reunion Chair	Nom. Chair
Recruit reunion chair(s) – if none were slated	Х							
Email some classmates each quarter to solicit news for <i>Quarterly</i>				Х				
Update website each quarter						Х		
Write annual class letter	X							
GOALS:								

Year Four

RESPONSIBILITIES – YEAR FOUR	Pres.	VP	Treas.	Sec'y Scribe	Head Class Agent	Web Coord.	Reunion Chair(s)	Nom. Chair
Attend Reunion Planning Workshop in the fall	Х						Х	
Review list of attendees from previous Reunion to identify possible new volunteers to work on Reunion	Х						Х	
Write annual class letter	Х							
Have reunion chair(s) in place	X							
Recruit Reunion subcommittee leaders							Х	
Email some classmates each quarter to solicit news for <i>Quarterly</i>				Х				
Update website each quarter						Х		
Appoint chair of Nominating Committee from three elected at last Reunion	Х							
Appoint balance of Nominating Committee	Х							
Hold Nominating Committee meeting to: Discuss a list of potential candidates Discuss procedures to select slate								X
GOALS:								

Year Five

RESPONSIBILITIES – YEAR FIVE	Pres.	VP	Treas.	Sec'y Scribe	Head Class Agent	Web Coord.	Reunion Chair	Nom. Chair
Email some classmates each quarter to solicit news for <i>Quarterly</i>				Х				
Update website each quarter						Х		
Fall Reunion letter due mid-Oct. to Association	Х						Х	
Winter Reunion letter due early Feb. to Association							Х	
Complete selection of candidates for new Class Board by February 1								Χ
Prepare records for hand off to new officers	Х	X	Х	Х	Х	Х	Х	Χ
Conduct class meeting on Reunion weekend	Х							
Present final slate of new officers during Class Meeting at Reunion								Χ
Prepare and present Financial Report at class meeting during Reunion weekend			Х					
Turn in approved slate to Association before leaving campus Reunion weekend	Х							
GOALS:								

A blank version of the Five-year Plan that your class can fill out for its own use follows below.

Annual Responsibilities

GENERAL RESPONSIBILITIES – EVERY YEAR	Pres.	VP	Treas.	Sec'y Scribe	Head Class Agent	Web Coord.	Reunion Chair	Nom. Chair
Collaborate on class letter	Х	Х	Х	Х	X	Х	X	Х
Send class letter (Aug. & Jan. good time)	Х							
Post class letter on website						Х		
Update website each quarter						Х		
Submit Form C to Alumnae Association			X					
Send copy of Form C to President			X					
Advise president of bills (for approval)			Х					
Email classmates each quarter to solicit news for Quarterly				Х				
Submit class notes to Quarterly each quarter				Х				
Set up meeting/conference call of Class Board	X							
Participate in meeting/conference call of Class Board	Х	X	Х	Х	Х	Х	X	Х
Discuss/Plan Mini-reunions	Х	Х						
Lead class projects		Х						
Review class giving history					Х			
Work with Office of Advancement on participation strategies					X			
Work with Office of Advancement on fundraising goals					X			
Send Annual Appeal letter					Х			
Encourage participation in Annual Fund	Х	Х	X	Х	Х	X	Х	Х

Year One

GENERAL RESPONSIBILITIES – YEAR ONE	Pres.	VP	Treas.	Sec'y Scribe	Head Class Agent	Web Coord.	Reunion Chair	Nom. Chair
Communicate with predecessor to ensure smooth transfer of responsibilities	Х	Х	Х	Х	X	Х	Х	Х
Attend New Class Officer Training Workshop (NCOT) in the fall	Х		Х			Х		
Appoint other officers to attend NCOT if pres./web coordinator cannot; consider using treasury funds to cover expenses of other board members to join	Х							
Send out post-Reunion letter	X						Х	
Ensure that former treasurer has sent in Form C by August 30			Х					
Email classmates each quarter to solicit news for Quarterly				Х				
Develop/update class website						Х		
Set up class bank account			Х					
Select class agents					Х			
CLASS GOALS:								

Year Two

GENERAL RESPONSIBILITIES – YEAR TWO	Pres.	VP	Treas.	Sec'y Scribe	Head Class Agent	Web Coord.	Reunion Chair	Nom. Chair
Update website each quarter						Х		
Email classmates each quarter to solicit news for Quarterly				Х				
Write annual class letter/email	Х							
Submit Form C to Alumnae Association			Х					
Participate in meeting/conference call of Class Board	X	Х	Х	Х	Х	Х	Х	Х
CLASS GOALS:								

Year Three

GENERAL RESPONSIBILITIES – YEAR THREE	Pres.	VP	Treas.	Sec'y Scribe	Head Class Agent	Web Coord.	Reunion Chair	Nom. Chair
Recruit reunion chair(s), if none were slated	Х							
Email classmates each quarter to solicit news for Quarterly				Х				
Update website each quarter						Х		
Write annual class letter/email	Х							
Submit Form C to Alumnae Association			Х					
Participate in meeting/conference call of Class Board	Х	Х	Х	Х	Х	X	Х	Х
CLASS GOALS:								

Year Four

GENERAL RESPONSIBILITIES – YEAR FOUR	Pres.	VP	Treas.	Sec'y Scribe	Head Class Agent	Web Coord.	Reunion Chair(s)	Nom. Chair
Attend Reunion Planning Workshop in the fall	Х						X	
Review list of attendees from previous Reunion to identify possible new volunteers	X						Х	
Write annual class letter	Х							
Have reunion chair(s) in place	X							
Recruit Reunion subcommittee leaders							Х	
Email classmates each quarter to solicit news for Quarterly				Х				
Update website each quarter						X		
Appoint chair of Nominating Committee from three elected at last Reunion	Х							
Appoint balance of Nominating Committee	Х							
Hold Nominating Committee meeting to: Discuss a list of potential candidates Discuss procedures to select slate								Х
Submit Form C to Alumnae Association			Х					
Participate in meeting/conference call of Class Board	Х	Х	X	Х	Х	X	Х	Х
CLASS GOALS:								

Year Five

GENERAL RESPONSIBILITIES – YEAR FIVE	Pres.	VP	Treas.	Sec'y Scribe	Head Class Agent	Web Coord.	Reunion Chair	Nom. Chair
Email classmates each quarter to solicit news for Quarterly				Х				
Update website each quarter						Х		
Fall Reunion letter due mid-Oct. to Association	Х						Х	
Winter Reunion letter due early Feb. to Association							Х	
Complete selection of candidates for new Class Board by February 1								Х
Prepare records for hand off to new officers	Х	Х	Х	Х	Х	Х	Х	Х
Conduct class meeting on Reunion weekend	Х							
Present final slate of new officers during Class Meeting at Reunion								Х
Prepare and present Financial Report at class meeting during Reunion weekend			X					
Turn in approved slate to Association before leaving campus Reunion weekend	Х							
Submit Form C to Alumnae Association			Х					
Participate in meeting/conference call of Class Board	Х	Х	Х	Х	Х	Х	Х	Х
CLASS GOALS:								

Snapshot of Five-Year Goals Class of ____

Year One Class Goals	Year Two Class Goals	Year Three Class Goals	Year Four Class Goals	Year Five Class Goals

Year One: July 2012 - June 2013

CLASS GOALS	ACTION STEPS
ASSOCIATION/ADVANCEMENT TASKS	ACTION STEPS

Year Two: July 2013 - June 2014

CLASS GOALS	ACTION STEPS
ASSOCIATION/ADVANCEMENT TASKS	ACTION STEPS

Year Three: July 2014 – June 2015

CLASS GOALS	ACTION STEPS
CLASS GOALS	ACTION STEPS
ASSOCIATION/ADVANCEMENT TASKS	ACTION STEPS
ASSOCIATION/ADVANCEMENT TASKS	ACTION STEPS

Year Four: July 2015 – June 2016

CLASS GOALS	ACTION STEPS
ASSOCIATION/ADVANCEMENT TASKS	ACTION STEPS

Year Five: July 2016 – June 2017

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CLASS GOALS	ACTION STEPS
ASSOCIATION/ADVANCEMENT TASKS	ACTION STEPS