

STRATEGIC GOALS AND IMPLEMENTATION PLAN FOR 2021-2023

The USAID Alumni Association (UAA) is an unincorporated nonprofit organization established for the purposes of: harnessing the voluntary experience and expertise of the USAID alumni in support of effective U.S. foreign assistance and sustainable development; serving as an independent voice to support USAID's development mission; fostering a network of former USAID employees who wish to utilize their public service skills to promote international development; and providing opportunities for social interaction among the members.

The UAA Board exercises responsibility, with input from members, for establishing the Association's goals and approving planned activities in furtherance of those goals. In exercising this responsibility, the Board relies upon the Association's committees. There is a lead committee for implementing each UAA goal. The lead committee collaborates with other committees, Board members, individual USAID alumni, and others in planning and carrying out activities. The views of UAA members inform and guide the Board in the formulation, periodic revision, and implementation of this plan.

The UAA goals and projected implementing actions for 2021-2023 build on the goals articulated for the previous planning period as reported in the 2020 Progress Report.

Goal 1. Ascertain alumni interests on a continuing basis; expand UAA membership by alumni residing outside as well as within the Washington area; increase opportunities for social events and interaction among alumni. Lead: Membership Committee.

The successful implementation of this goal's activities in 2020 resulted in increasing UAA registered alumni from 1,064 to 1,137 (a 7% increase from 2019), of which: 437 (18% increase) additional contributing members, 170 (34% increase) additional Friends of UAA, and several associate members. (See the UAA 2020 Progress Report or website for more details on types of members.)

In furtherance of this goal in 2021-2023, UAA proposes to take the following actions:

- Annually, conduct an Evaluation of the Annual General Meeting (AGM) and a Survey of Members. Reports on the Evaluation and Survey will inform the work of the UAA Board and committees and will be published in the UAA newsletter and on the website. The information will be shared with the UAA Executive Committee and information specific to each UAA Committee will be shared specifically with them. A Mini-Survey to gather more consistent demographic information about current registrants is planned to be conducted in alternate years instead of a more comprehensive Survey of Members.
- Continue to recruit additional registrants and contributing members and Friends of UAA). These efforts include:
 - Recruiting new and incipient USAID retirees through: (a) participating in Foreign Service Institute Career Transition Center seminars for Foreign Service (FS) and General Schedule (GS) employees; and (b) accepting interested parties to join the UAA LinkedIn group;
 - Implementing a standard methodology for identifying potential new registered alumni and contributing members among those who attend UAA events;
 - Sending tailored emails to those who attended events, who are newly registered alumni but do not contribute financially as members, or who had previously contributed to UAA but have not yet contributed in the current year;
 - Expanding recruitment of former Foreign Service Nationals (FSNs) by helping overseas FSN Committees at USAID Missions to form UAA-affiliated FSN alumni associations in pilot countries and by reaching out, through USAID Office

- overseas FSN Committees at USAID Missions to form UAA-affiliated FSN alumni associations in pilot countries and by reaching out, through USAID Office of Human Capital and Talent Management (HCTM) and Executive Offices (EXOs) worldwide, to imminent or already retired FSNs overseas to join UAA;
 - Attracting new alumni volunteer talent to the Membership Committee;
 - In concert with the Membership and Public Outreach Committees, identifying effective ways to engage groups of alumni who share subject matter interests or location in the same geographic area in an effort to establish chapters or satellite hubs;
 - Seeking a UAA member volunteer to maintain the UAA LinkedIn website to encourage and manage participation in the UAA LinkedIn group and support and promote communication among alumni who wish to use their public service experience to advance global development.
- Schedule programs and social events each year intended to respond to interests of members and potential members, including events outside the Washington area. Planned activities include:
 - Holding more virtual events via Zoom to encourage UAA registrants and members around the country and overseas to participate in local DC events;
 - Holding regular social events in person or virtually, as appropriate, including: Winterfest in February; Spring Reception in May; Summer Picnic in September; and Annual General Meeting in October;
 - Encouraging members' participation in other UAA-hosted meetings with Development Dialogue UAA/DACOR speakers, Development Issues Committee discussions, and the Book Club reviews.
 - Publicizing post-USAID options for employment, volunteerism, and other activities on the UAA website; and
 - Through the Membership and the Public Outreach Committees, identifying and encouraging UAA registrants living outside the DC area to connect with each other.
- Circulate a monthly newsletter to all registered alumni, including a calendar of upcoming events, articles and updates of interest. Archive each issue promptly on the UAA website.
- Complete the comprehensive communications system review and implementation of website improvements which were begun in 2020
- Post a profile of a UAA member each month in the newsletter and on the website to share that member's life and interests after retirement.
- Through the Awards Committee, present the annual alumni awards at the AGM to UAA members for their outstanding post-retirement contributions to their communities at home and abroad, based on nominations from UAA members.

Goal 2. Maintain and enhance a continuing relationship with USAID that will make alumni available to support the training, mentoring, coaching and recognition of USAID staff on a systematic basis. Lead: Strengthening USAID Committee.

In furtherance of this goal, in 2021-2023 UAA proposes to take the following actions:

- Negotiate and finalize implementation documentation for the new, 2020 Memorandum of Understanding (MOU).
- Continue implementation of the Mentoring Program to provide Senior Leadership Group (SLG), Payne Graduate, and FSO, globally, including Cohorts 10 (Nov 2020- 2021) and 11 (Nov 2021-2022).

(SLG), Payne Graduate, and FSO, globally, including Cohorts 10 (Nov 2020- 2021) and 11 (Nov 2021-2022).

- Undertake the second evaluation of the Mentoring Program, including the expansion efforts.
- Expand UAA support to USAID in ways that implement the 2020 MOU, including support for Agency strategy preparation and review, public outreach, expanding mentoring to new client groups, among other activities pursuant to the MOU.
- In addition to its mentoring program, UAA will maintain contacts with senior USAID officials – both political appointees and career staff – to ensure that UAA (a) remains current on USAID policies and programs, especially for mentors, and (b) directly interfaces with the Agency. Among possibilities on Item (b) that have been discussed with Agency officials are a recognition ceremony for employees at the time of retirement and support for Foreign Service National (FSN) retirees and the FSN Advocacy Council.

Goal 3. Facilitate contributions by alumni and sharing of information with respect to USAID policies and strategies and with respect to developments and trends in development cooperation. Lead: Development Issues Committee.

In furtherance of this goal in 2021-2023 UAA proposes to take the following actions:

- UAA will organize discussion programs focused on current development issues of interest to alumni. This will include each year at least five meetings of the Development Issues Committee with an invited guest to lead a discussion of a development topic of interest to the membership and at least eight “Development Dialogue” events jointly sponsored with DACOR. To the extent possible, the “Development Dialogue” programs will be conducted in person, virtually if not (or some in combination to allow participation of alumni not in the Washington metropolitan area); all programs will be recorded and made available for listening on the UAA website.
- UAA will maintain periodic direct communications with USAID’s Bureau of Policy, Planning and Learning (PPL), or its successor, through which UAA will keep PPL informed of UAA activities of potential interest to USAID. UAA will learn from PPL about current policy issues in which the experience of UAA members could be helpful to USAID, and PPL will advise UAA of upcoming events, such as USAID Partnership Meetings and meetings of the Advisory Committee on Voluntary Foreign Aid (ACVFA), in which UAA will be invited to participate.
- UAA will elicit opportunities for USAID alumni to share with USAID their knowledge and expertise relevant to proposed new USAID policies and strategies.
- UAA will continue to sponsor discussions of development-related books, led by volunteer alumni.
- UAA will seek to identify at least one opportunity each year for a discussion program outside the Washington, DC area.
- UAA will include links to books by USAID alumni, syllabi for courses on international development, and lists of recent articles of interest to alumni on its website and encourage commentary on the issues addressed.

Goal 4. Increase broad awareness and understanding of lessons learned from USAID’s experience in development and humanitarian assistance to help guide future USAID programs. Compile and publish a readable independent history of USAID’s development experience to increase understanding of lessons learned. In further support of this goal, increase the number of USAID oral histories, and build a bibliography of books by USAID authors. Lead: History Project Committee

In furtherance of this goal, in 2021-2023 UAA will take the following actions:

With regard to the USAID History Project, the UAA will:

- Work closely with the book’s author, John Norris, and with the publisher to arrange for the history’s publication and related launch events to publicize it with a broad audience:

- Work closely with the book’s author, John Norris, and with the publisher to arrange for the history’s publication and related launch events to publicize it with a broad audience;
- Send a copy of the book to each of the persons who contributed to our fund-raising appeal;
- Arrange for a wide distribution of the book to multiple audiences, using the book as a basis for intensive efforts to promote greater understanding and support for the aid program and for a leading role for the United States in global development efforts;
- Work with the publisher to develop related formats (e.g., an e-book, on-line and social media) in order to distribute the historical material more broadly as part of an active educational program; and
- Establish a relationship with a university or some other institution as a home for the materials Norris has collected as part of his book research and for future collaboration on updates and dissemination of the history on a continuing basis.

With regard to the Oral Histories:

- UAA will maintain its collaboration with the Association of Diplomatic Studies and Training (ADST) and USAID to expand further the number of USAID oral histories in the ADST collection. If the grant proposal submitted by ADST to USAID, in collaboration with UAA, is approved, this will enable significant activity. If not, UAA will continue to explore other options for funding.
- A UAA Board Member was elected to the ADST board of directors in 2020. He, plus the UAA ex officio member of the ADST board, will work to expand USAID-related materials on ADST’s U.S. Diplomacy website.

Goal 5. Maintain, expand, and enhance beneficial relationships with other organizations and facilitate opportunities for USAID alumni to inform audiences and communities about development and the role of the United States and USAID. Lead: Public Outreach Committee.

In furtherance of this goal, in 2021-2023 UAA proposes to take the actions noted below. These may be affected by the yet-to-be finalized agreement on an operational “scope of effort” document allowing alumni to provide *pro bono* services to implement activities under the signed UAA-USAID MOU.

- In addition to DACOR, UAA will continue to work with internationally-oriented groups such as the American Foreign Service Association (AFSA), the Center for Global Development (CGD), the Modernizing Foreign Assistance Network (MFAN), the U.S. Global Leadership Coalition (USGLC), the Brookings Institution, and the Washington Chapter of the Society for International Development (SID). This may involve shared member activities, coordinated public messages and/or joint public presentations, among others.
- UAA will strengthen its collaboration with USAID’s Hometown Diplomats and Development Directors in Residence programs. UAA will link alumni living near these groups and provide, where needed, training and substantive background materials for mentoring and/or public speaking on development themes.
- UAA will help connect international affairs organizations such as Rotary International, World Affairs Councils, Great Courses Groups, and universities/community colleges with UAA members for the purpose of educating U.S. citizens about USAID, international development and humanitarian service. UAA will help prepare USAID members for these opportunities and identify or develop resource materials drawing on both member expertise and material USAID can make available.
- UAA will continue to explore with USAID Office of Human Capital and Talent Management (HCTM) ways to improve outreach to universities through internships, alumni teaching, and access to USAID reports, evaluations and oral histories. UAA will also work to expand USAID-related materials on ADST’s U.S. Diplomacy website. (See also Oral Histories under Goal 4.)

alumni teaching, and access to USAID reports, evaluations and oral histories. UAA will also work to expand USAID-related materials on ADST's U.S. Diplomacy website. (See also Oral Histories under Goal 4.)

- UAA will pursue efforts to pilot the setting up of a regional “satellite hubs” of UAA among alumni residents in a geographical area of concentration in 2021, and if successful, will pursue establishing additional “hubs” or chapters in other areas. Possible geographical areas, based on concentrations of UAA members, are Florida, North Carolina, New Mexico, New England, California and Seattle/Portland areas.
- Once the new UAA advocacy policy is approved by the Board, the Executive Committee will consider taking advocacy positions on selected issues in 2021 and beyond. Initially this will include Executive Committee review of recommendations on the future of USAID and foreign assistance made by such groups as MFAN, Brookings, CGD, CSIS, and InterAction to transition teams following the 2020 national election – and possible UAA statements on those recommendations it feels would benefit from the endorsement of retired career USAID officers.

Goal 6. Assure that internal UAA systems and procedures provide effective, efficient and transparent management of resources and services to USAID alumni. Leads: Finance and Administration Committee and AGM Committee.

In furtherance of this goal in 2021-2023, UAA proposes to take the following actions:

- UAA will consider changes to the Bylaws and/or procedures based on topics discussed at the Annual General Meetings (AGM) or identified in Member Surveys, the Financial Review (such as documenting its core financial procedures, including internal controls for approval by the UAA Board in 2021), and/or the Compilation and Review of our financial records.
- For October 2021, UAA will again organize a substantive AGM, which in 2020 was held as two virtual meetings in late October and early November. Depending on pandemic circumstances in 2021 and 2022, the AGMs will be in person or virtual or some combination to allow for broad participation by UAA members.
- UAA will plan for continuity and succession when considering nominations for Board and committee co-chair vacancies that occur.
- UAA will conduct a review of the processes used to vet, register, and accept membership contributions from alumni in order to update and improve its membership and directory processes, thereby improving outreach and communication with USAID alumni.
- UAA will ensure compliance with audit or Internal Revenue Service (IRS) procedures related to revenue from membership contributions and from the USAID History Project.
- UAA will continue to refine the content of the website to increase its value to alumni and will consider new features as appropriate.