

2009 Alumni Association Update and Accomplishments

Over the past three years the Alumni Association has taken some significant steps to enhance relationships and increase the value of Association membership.

Following is a report on some of these accomplishments intended to advance the University of the Pacific, Arthur A. Dugoni School of Dentistry Alumni Association.

I. Alumni Strategic Plan

Under the presidency of Jade Miller '81 (2006-2007 Alumni President), the Association began to look at its future with a membership survey and several Board of Directors planning meetings. Under the guidance of Dr. Karl Haden and the Academy of Academic Leadership, the Board was assisted through the beginning of an evaluation and planning process.

Starting with a Joint Advance meeting between the Pacific Dugoni Foundation (PDF) Board, then called the PDEF, and the Alumni Board in the fall of 2007, the Alumni Board began to develop a Strategic Plan to guide the Association through the next three to five years.

Under the leadership of Nava Fathi '95 (2007-2008 Alumni President), and Darryl Lee '77 (2008-2009 President), an Implementation Plan began to take shape. The board developed a Vision, Mission, Values, Direction and Goals Statement. Find a copy attached.

Implementation involved the formation of seven working committees, each focusing on a separate action step as expressed in the 2007 membership survey.

1. *Alumni Values for Students and Residents* – Chair, Suzanne Saidi '91
To improve Alumni values among both students and residents
2. *Continuing Education Programs* – Chair, Dan Castagna '81
To develop top quality CE for alumni
3. *On Line Alumni Content* – Chair, Nader Nadershahi '94
To develop on-line content and resources for alumni
4. *Membership Enhancement* – Chair, Nava Fathi '95
To grow and expand active alumni membership
5. *Practice Management* – Chair, Bill van Dyk '73
To develop Practice Management resources and programs for alumni
6. *Board Governance* – Chair, Debra Woo '86
To review board bylaws and the operations manual
7. *Financial and Revenue Support* – Chair, Marc Geissberger '91
To develop, review and enhance financial and revenue support

Implementation is high on the agenda under Marvin Carnow '74A (2009-2010 Alumni President) and Debra Woo '86 (2010-2011 Alumni President) is planning a second Joint Advance meeting with the PDF Board for review and revision of the Strategic Plan during her presidential term in the Fall of 2010.

The Alumni Board and Working Committees acting on the Strategic Plan have already initiated a number of major changes and improvements which are reviewed below.

II. Enhancing the support and efficiency of the Alumni Office

With the adoption of the Alumni Strategic Plan, several steps have been taken to increase support and resources within the Alumni Office.

- Secured the services of a professional Accounting and Tax Service
- Development and implementation of Office Business Systems
- Increased Office Staffing
 1. Alumni Director – 3 days per week, Joanne Fox
 2. Administrative Assistant/Coordinator – 5 days per week, Andrea Woodson, providing weekly personal contact for the Alumni Office.
 3. Manager of Alumni Online Communications – 20 hours per week, Kara Sanchez, graciously supported by the dean's office for 2 years.
- Secure Online Alumni Community Software – under development
- Develop Marketing and Web capability – under development
- Develop and implement accounting systems –under development
- Develop an online Alumni Directory – under development
- Kara Sanchez and Nader Nadershahi '94, Chair of the Online Alumni Content Committee have reviewed and guided the contract for a community web page.

III. Review and update of the Alumni Bylaws and Operations Manual

At the 2008 Annual Meeting, the membership approved changes and updates to the Alumni Bylaws. The Board Governance/Bylaws Committee, under Chair Debra Woo '86, has also proposed – and the Board has adopted – changes to the Operations Manual. Changes include:

- The Officer Position of Dean Emeritus
- Six year term for the Treasurer
- Establishment of positions for 6 students to serve as members on the board, 3 DDS, 2 IDS and 1 Hygiene - providing a total of 3 votes for the students serving on the board and establishing a full voting board position for a graduate of the Stockton Dental Hygiene Program
- Establishment of the position of Ex-Officio for the Dean and Director of Institutional Advancement
- Establishment of criteria for the Program Committee
- Creation of 3 levels of membership - Active, Associate and Honorary

IV. Treasurer-Elect Position

The membership approved a Bylaws change in 2008 creating a 6 year term for the position of Treasurer who is elected by the Board. Along with this change the board approved a new board position of Treasurer-Elect. For the first two years, the Treasurer will serve as Treasurer-Elect which will overlap with the last two years of the current Treasurer. This will allow for continuity and enhanced fiscal responsibility.

V. Enhancing membership with Chapter Events

Responding to the Alumni Survey, the Strategic Plan has placed a significant importance on developing and implementing chapter events throughout the Western U.S. These are usually held in conjunction with national, state or local meetings of organized dentistry. Under the Chair of the Membership Enhance Committee, Nava Fathi '95, Alumni chapter events have been held or are planned, usually on an annual basis, for the following locations:

- Anaheim – CDA Anaheim meeting
- Dana Point – CE meeting
- Honolulu – ADA and local chapter CE meetings
- Phoenix, Arizona – ADEA Annual meeting
- Salt Lake City, Utah – Utah State meeting
- San Antonio, Texas – ADA meeting
- San Diego – Day at Del Mar Races
- San Francisco – CDA and ADA meetings
- Seattle, Washington – Pacific Northwest Dental Conference
- Reno, Nevada – Local Chapter event

VI. Practice Management Program

Under the chair of the Practice Management/Mentor committee, William van Dyk '73, a significant portion of the program at the 2009 Annual Meeting was devoted to Practice Management Issues.

- Members of both the PDF and Alumni Boards have begun to participate in the student presentations of the Business Plans for the Management Science Course.
- Program Committee Chair Dan Castagna '81 has been working with the 2010 Program Chair, John Schulz '74A, to develop the 2010 program and identify speakers.

VII. Revenue Enhancements

- Annual Meeting Registration Fee – Starting with the 2008 Annual Meeting, the Board enacted a registration fee of \$50 for each participant. This fee was increased to \$75 for the 2009 Annual Meeting.
- Annual Alumni Dues – With the implementation of the registration fee in 2008, dues were maintained at the previous year's level of \$175 for 2008. They were raised to \$195 for 2009.
- Through the generosity of our Alumni, our Alumni Scholarship Endowment has increased in value to \$1.2 million and we are currently helping six students per year with financial aid.
- The Financial and Revenue Support Committee, under Chair Marc Geissberger '91, has begun to implement financial systems to further analyze and evaluate the budget. A new version of QuickBooks will be installed to provide more timely and detailed analysis of our income and expenses.
- The Treasurer-Elect has begun a transition phase with the Treasurer

VIII. Annual Alumni Meeting

- The Annual Meeting continues to be the largest expenditure of resources within the Association. The attendance has continued to grow each and every year. The 2009 meeting was the first one held at the San Francisco Marriott Hotel. Over 1,400 alumni and students pre-registered, 150 alumni registered on site and over 1,240 were in actual attendance. The Friday evening reception was attended by over 450 alumni.
- The 2010 Annual Meeting will return to the Fairmont Hotel on March 12-13, 2010. The 2011 Annual Meeting is also scheduled for the Fairmont Hotel on March 3-5, 2011.

IX. Alumni Portfolio

The Alumni Portfolio has experienced the same performance as the general economy. In the 18 months proceeding December 2008 the portfolio decreased in value by 30%. The Portfolio Manager is holding value line equities and increasing the cash portion when possible. The value of the portfolio has slowly increased since January of 2009. Re-evaluations will be performed on a six-month basis.

The alumni portfolio is now evaluated on a monthly basis by the Treasurer in consultation with the Portfolio Manager.

X. Matching Class Gifts

Starting with the Class of 2008, the board has been happy to match the class with a donation of \$3,500 to go towards a class gift presented at the Alumni/Graduate Banquet. The total given to the school by the Class of 2008 was \$13,000.

The board has approved a matching gift of \$3,500 for the Class of 2009.

XI. Student Support Projects

Under the chair of Suzanne Saidi '91, along with David Bird '09, third year student representative, the Alumni Values for Students and Residents Committee has initiated a number of supportive programs:

- Collection of extracted teeth for laboratory classes and board examinations.
- Helping secure patients for state and regional boards.
- Articles have been written for the quarterly student publication, The Articulating Paper, by Marvin Carnow '74A and William van Dyk '73.
- Solicitation for contributions and support for overseas student missions.
- Second year student representative, Lauren Young '10 will begin working with William van Dyk '73 on a Mentor Program.

University of the Pacific
Arthur A. Dugoni School of Dentistry

Alumni Association Strategic Plan

June 8, 2007

Vision

Pacific: Pride, Passion, and Performance

Mission

The mission of the Arthur A. Dugoni School of Dentistry Alumni Association is to foster lifelong relationships among its members and with the school.

Values

Integrity – The Association is guided by accountably and high ethical standards.

Communication – The Association encourages active listening and open discussion, keeping members informed and connected to the school.

Leadership – The Association exemplifies visionary guidance with innovation and dedication.

Camaraderie – The Association is held together by a deep sense of belonging to the Dental School family, goodwill and rapport among members.

Strategic Directions

- Ensure exemplary service to and communication with members
- Sustain the Association’s uniqueness and vitality
- Secure the human and financial resources for growth and continuous improvement in the Association

Goals

1. Improve the value of the Alumni Association among students and residents.
2. Create a multi-venue, top-quality continuing education program, with discounts to alumni, that becomes the first-choice for Pacific Alumni.
3. Develop and maintain a content rich online presence for the Alumni.
4. Grow and Expand Active Alumni Membership.
5. Develop a program of practice management to include transitions, opportunities, staff development, and resource information.
6. Conduct a review of Board Governance.
7. Fund revenue streams to include advertising and sponsorship.