

MISSION: To fulfill the principles of *The Bond* by providing our members a lifetime association that enhances success, enjoyment, and fulfillment in life

VALUES: Friendship, Sound Learning, and Rectitude

VISION: To be the premiere fraternal leadership development organization in North America

Strategic Initiatives

Goal Statements

	1-Growth	2-Education	3-Support	4-Communication	5-Capacity	6-Funding
	Execute strategies for the expansion of new chapters and the growth of existing chapters to achieve 200 chapters and the largest average chapter size in the Fraternity World.	Develop a holistic educational effort through programs that utilize technology and promote our values to undergraduate and alumni members.	Build a strong chapter and alumni support structure to improve operations and to offer the finest and safest housing in the Fraternity World.	Promote our value to members, potential members, and stakeholders.	Strengthen the operational infrastructure of the General Headquarters through the leverage of talent and technology.	Implement strategies to significantly grow the Fraternity's Foundation endowment and develop other regular revenue streams.
	<p>1.1-Expansion</p> <ul style="list-style-type: none"> Execute an expansion strategy that culminates in an undergraduate total of 14,000 members that make up 200 chapters by 2020 through an effort that installs 8 chapters per year for the next 10 years. <p>1.2-Increase Campus Market-Share</p> <ul style="list-style-type: none"> Execute a growth and retention strategy to assist existing chapters and colonies to obtain an average chapter/colony size of 70 men or an average chapter size larger than our Fraternity peer group. <p>1.3- Recruitment Culture</p> <ul style="list-style-type: none"> Create a year-round recruitment culture that helps achieve the Fraternity's growth goals. 	<p>2.1-Values-Based Leadership Development</p> <ul style="list-style-type: none"> Provide values-based leadership experience that reaches 18,000 members (undergraduates and alumni) by 2020 through in-person conferences. <p>2.2-Undergraduate and Alumni Officer Development</p> <ul style="list-style-type: none"> Provide undergraduate and alumni volunteers with officer-specific training through conferences and online certification-based training. <p>2.3-Standardized Phikeia Education</p> <ul style="list-style-type: none"> Design and implement a standardized Phikeia program for use by all undergraduate chapters that thoroughly educates and prepares new members for an active, lifelong membership. <p>2.4-Sound Learning</p> <ul style="list-style-type: none"> Assess the success of academic minimum standards and academic programming while providing programming that offers opportunities for membership development. 	<p>3.1-General Fraternity Support</p> <ul style="list-style-type: none"> Further enhance and build the collaboration between the Province President and Leadership Consultant programs to foster student leadership, education, chapter development, and alumni support. <p>3.2-Local Alumni Support</p> <ul style="list-style-type: none"> Recruit, educate and retain 1,000 chapter advisory board members (an average of five per chapter) who are fully certified and determined to be 80% effective through evaluations by 2020. <p>3.3-Chapter Retention</p> <ul style="list-style-type: none"> Provide strategic support to chapters who may be failing in their chapter operations and/or to meet the standards of the Minimum Standards Program. <p>3.4-Housing</p> <ul style="list-style-type: none"> Improving, preserving, and growing the Fraternity's historic and valuable housing portfolio through supportive local fundraising to infuse capital and resources that provide campus leading facilities and engaged, certified house corporations. 	<p>4.1-Branding</p> <ul style="list-style-type: none"> Design and implement a new brand position that enables the Fraternity to clearly articulate benefits to members and non-members alike. <p>4.2-Information Quality</p> <ul style="list-style-type: none"> Improve the quality of our member and constituent data to enhance our communications and relationships. <p>4.3-Communication Channels</p> <ul style="list-style-type: none"> Increase the quality, frequency and breadth of communications to members and constituents. <p>4.4-Career Transition and Networking</p> <ul style="list-style-type: none"> Execute a strategy that provides mentoring and networking opportunities for all members by leveraging the member base. 	<p>5.1-Talent Development</p> <ul style="list-style-type: none"> Acquire, develop, and retain the best staff in the fraternity world. <p>5.2 -Technology Solutions</p> <ul style="list-style-type: none"> Review and assess current information technology efforts and implement solutions that improve current deficiencies. Maintain leadership in use of technology in the Greek world to achieve other key objectives. <p>5.3-Financial Management</p> <ul style="list-style-type: none"> Enhance the accounting and investment practices of Fraternity funds. 	<p>6.1-Endowment</p> <ul style="list-style-type: none"> Continue major gift initiative by raising \$20 million excluding the scholarship endowment in the Foundation. <p>6.2-Annual Fund</p> <ul style="list-style-type: none"> Enhance annual fund program to build lifelong donors while providing a funding stream that supports Foundation operations by raising \$2 million annually. <p>6.3-Merchandising/Sponsorships</p> <ul style="list-style-type: none"> Establish a merchandising and sponsorship program that generates over \$200k annually by 2020. <p>6.4-Loyalty and Cause Funding</p> <ul style="list-style-type: none"> Further develop the Iron Phi program as a self-sustaining operation that provides at least \$200k in funding annually to the Fraternity by 2020 and to further institutionalize the True Blue Society as a part of Phi Delta Theta culture so as to generate at least \$100k by 2020 for <i>The Scroll</i> and alumni programming.

1-Growth	2-Education	3-Support	4-Communication	5-Capacity	6-Funding
<p>1.1- Expansion 1.1.1-Refine position description and expectations of the Survey Commission: DOE and General Council- By 1.20.11</p> <p>1.1.2-Create a menu of services and corresponding prices for alumni-funded expansion projects: DOE and Survey Commission- By 8.31.11</p> <p>1.1.3- Employ four expansion consultants for 6 staff-driven expansion projects and colony education: DOE and Survey Commission- By 8.31.12</p> <p>1.1.4-Develop marketing strategy to reach college-bound students attending universities on our wish list and where we currently have chapters by looking to higher education models: DOE, AEVP, and DOC- By 8.31.14</p> <p>1.1.5-Develop a strategy to attract and colonize three student-led interest groups each year: DOE and Survey Commission- By 8.31.14</p> <p>1.1.6-Introduce expansion protocol that promotes campus market share goals: DOE and Survey Commission- By 2.28.15</p> <p>1.1.7- Secure and conduct 12 staff-driven expansion/revitalization projects each year: DOE and Survey Commission- By 5.31.17</p> <p>1.1.8- Explore revised model of Fraternity chapter concept: DCS, DOE, VPGC, COO- By 12.31.18</p> <p>1.2- Increase Campus Market Share 1.2.1-Raise membership standards for chapters and colonies to 40 men: General Council and Survey Commission- By 8.31.11</p> <p>1.2.2- Launch alumni-funded Leadership Consultant Coaching Program: DCS and AEVP- By 8.31.13</p> <p>1.2.3-Facilitate annual strategy to acquire potential new member contact information with a submission goal of 350 self-interest forms, 200 referral-by-others forms, 500 forms through demand creation to futurephidelt.org and 35 start-a-chapter forms- By SDE- By 12.31.17</p> <p>1.3-Recruitment Culture 1.3.1- Institute regional conferences focusing on undergraduate recruitment and alumni recruitment support: DET-By 12.31.10</p> <p>1.3.2- Implement strategic recruitment module-to train of all General Headquarters staff members, general officers, and local volunteers: DCS and Phired Up Staff- By 12.31.14</p>	<p>2.1-Values-Based Leadership Training 2.1.1-Ensure that sexual misconduct prevention, masculinity, or similar topics become a part of each in-person educational conference: DOED - By 1.9.2015</p> <p>2.1.2-Reach an average of 1,900 attendees at in-person educational conferences in order to work towards the eventual aggregate goal of 18,000 by the conclusion of this plan - By 7.1.2015</p> <p>2.1.3-Provide the FHSI workshop <i>Taking a Stand: Preventing Sexual Misconduct on Campus</i> to all chapters and colonies with 100% member attendance initially and following the conclusion of comprehensive bystander research: DCS and DIS- By 12.31.2017</p> <p>2.1.4-Determine comprehensive bystander assessment and educational strategy that addresses sexual assault, hazing, alcohol diversity, and mental health: DOED- By 12.31.2017</p> <p>2.1.5-Create and implement strategy to further encourage the best and brightest members of organization to attend in-person conferences: DOED and SDE- By 5.31.2018</p> <p>2.2-Undergraduate and Alumni Officer Development 2.2.1-Introduce Whole Man Leadership and Ethics Track: DOED- By 8.2.14</p> <p>2.2.2- Reach an annual goal of 5,000 online training participants in an effort to reach the aggregate goal of 16,000 by the conclusion of 2020: DOED and Ed. Committee.</p> <p>2.2.3-Achieve 100% certification rate of Executive Committee Members educated online: DOED and Ed. Committee- By 8.31.18</p> <p>2.3-Standardized Phikeia Education 2.3.1-Implement a standardized Phikeia Education Program: DOED , Phikeia Education Committee, and Ed. Committee- By 8.31.13</p> <p>2.3.2- Expose all chapters and their Phikeias to online program: DOED- By 5.31.18</p> <p>2.4-Sound Learning 2.4.1-Gauge effectiveness of academic minimum standard and academic programming: DCS- By 5.31.12</p> <p>2.4.2- Determine feasibility of academic support model: DOED-By 11.30.12</p> <p>2.4.3-Construct complimentary plan that prioritizes theoretical educational framework priorities within Phi Delt 2020. This will enhance current educational offerings, state the need for additional programming and feature the use of already existing campus resources: DOED and Ed. Committee- By 4.30.16</p> <p>2.4.4- Ensure educational programming is properly positioned for Generation Z including the development of life skills, channeling the entrepreneurial spirit, and addresses emotional and psychological demands: DOED-by 12.31.18</p>	<p>3.1-General Fraternity Support 3.1.1-Develop service model that features an optimal consultant to chapter ratio- By 7.1.20</p> <p>3.1.2-Reach a 90% Chapter Greatness Checklist reporting rate: DCS & SDE – By 6.30.17</p> <p>3.2-Local Alumni Support 3.2.1-Revise province president job description to provide focus on growth and retention: DCS- By 10.31.16</p> <p>3.3-Chapter Retention 3.3.1-Develop a comprehensive and year-round recruitment education strategy: DCS and Phired Up-By 12.31.14</p> <p>3.3.2-Complete a comprehensive study of chapter loss and determine and implement proactive intervention strategy: CPC-By 1.31.2017</p> <p>3.3.3-Validate that every chapter is compliant with tax regulations and has a process to file an annual tax return: DCS, AEVP-By 8.31.2017</p> <p>3.4-Housing 3.4.1- Ensure that all chapter houses have sprinkler systems and meet other life-safety requirements or have a specific plan to do so: DHF- By 12.31.12</p> <p>3.4.2- To provide at least one in-person House Corporation Summit experience in non-convention years: DHF- By 8.2.14</p> <p>3.4.3- Utilize a full suite of facility evaluation resources to appraise overall housing stock and to provide a reserve study that will outline the required capital needs for the planning of future renovations and repairs at each location: DHF- By 6.30.15</p> <p>3.4.4-Provide a full suite of fund raising campaign resources to house corporations in need of raising capital to improve facilities and to improve alumni engagement in concert-By COO and DHF-By 5.31.17</p> <p>3.4.5-Engage house corporations through campus visits and remote coaching: DHF-By 12.31.17</p> <p>3.4.6-Develop and enhance education efforts to improve facility management, facilitate the sharing of best practices, and introduce trusted vendors for common issues: DHF by 12.31.18</p> <p>3.4.7- Develop strategy for additional mixed-use facilities and increased space for the development of life skills: DHF- By 12.31.18</p> <p>3.4.8- Recruit, train, and retain a certified five (5) man house corporation for each owned facility: DHF- By 6.30.20</p> <p>3.4.9-Work to ensure that at least 66% of chapter facilities have a live in presence: DHF- By 7.1.20</p> <p>3.4.10- Increase Palmer asset portfolio to \$15 Million: WBPF Trustees and DHF- By 6.30.25</p>	<p>4.1-Branding 4.1.1-Engage in a strategic foresight process to determine future planning and competitive position then revise strategic plan accordingly: SDE and COO – By 5.31.17</p> <p>4.1.2-Revise brand position to further emphasize the organization as values-based and promote diversity and inclusion: VPCG and COO – By 12.31.18</p> <p>4.2-Information Quality 4.2.1- Develop and institute a survey that gathers basic socioeconomic data of members upon joining and repeat every three years: DOC and AEVP- By 5.31.14</p> <p>4.2.2- Complete comprehensive data needs assessment of organization to provide greater analytical abilities and data sharing: VPGC and COO - By 6.30.18</p> <p>4.2.3-Increase the percentage of accurate email addresses (31 to 60%), physical addresses (60 to 85%) and obtain 60% of mobile numbers for members, parents, and Greek officials- By 6.30.20</p> <p>4.3-Communication Channels 4.3.1- Execute undergraduate demographic survey to better understand composition of current population for future strategic decisions: SDE- By 3.1.15</p> <p>4.3.2-Begin highlighting and acknowledgement of both campus and alumni advisers through a regular Scroll feature and by sending a regularly scheduled acknowledgement: SDE- By 7.31.15</p> <p>4.3.3-Market and promote branded chapter websites along with the benefits of a social media presence resulting in 100% of all chapters with a well-positioned website and social media presence: SDE – By 6.30.17</p> <p>4.3.4-Provide undergraduate chapters with alumni communications solution: AEVP and SDE- By 12.31.17</p> <p>4.4-Career Transition and Networking 4.4.1- Introduce regional professional development events in conjunction with Phi Delt Weekends and develop a similar model that can be executed by alumni clubs: SDE – By 6.30.15</p> <p>4.4.2-Revise mobile application to allow members to identify, locate, connect and meet up with one another for networking purposes with enhanced location and event services: SDE – By 6.1.17</p> <p>4.4.3-Require all alumni clubs to host alumni networking events: SDE- By 6.30.18</p> <p>4.4.4-Consider additional alumni programming that further establishes the value of a life-long membership experience: VPCG- By 12.31.18</p>	<p>5.1-Talent Development 5.1.1-Develop transition outlines based on job descriptions for all positions and organize corresponding files to assist with transitions: All Staff- By 6.30.11</p> <p>5.1.2-Create a staff professional development committee to promote educational opportunities that enhance the workplace and promote efficiency: AEVP- By 6.30.11</p> <p>5.1.3- Complete comprehensive review of employee benefits package: AEVP- By 12.31.14</p> <p>5.1.4-Introduce a web-based orientation program for all new GHQ staff members: DET and AEVP- By 4.1.15</p> <p>5.1.5--Develop undergraduate intern solution at GHQ for current members: DOE- By 1.31.16</p> <p>5.1.6- Successfully implement committee structure that complements strategic plan and staff abilities- Executive Staff- By 2.28.17</p> <p>5.1.7- Restructure staff to provide greater opportunities for professional development by delegating operational responsibilities- COO- By 2.28.17</p> <p>5.1.8- Reorganize staffing to provide emphasis on self-sufficient growth and retention strategies and be mindful of Department of Labor standards- COO- By 6.30.17</p> <p>5.1.9-Revise and implement staff evaluation plan at all levels that measures performance and facilitates coaching- By 5.31.18</p> <p>5.1.10-Launch Succession Plan for Executive Vice President Post: General Council- By 12.31.18</p> <p>5.2-Technology Solutions 5.2.1-Explore opportunities to move toward a cloud computing model and a server-less office: AEVP, DCS, DOED, SD, and DOC - By 12.31.13</p> <p>5.2.2- Develop disaster recovery plan to temporarily relocate all Fraternity operations in the case of an emergency: AEVP- By 3.31.18</p> <p>5.2.3- Review financial software to enhance operations: AEVP and BC- By 6.30.18</p> <p>5.3- Financial Management 5.3.1- Review current investment policies and partners: AEVP- By 12.31.12</p> <p>5.3.2-Examine the opportunity to adopt a cash management strategy: AEVP and EVP- By 12.31.12</p> <p>5.3.3- Historically review Fraternity, WBPF, Foundation, and Mitchell Fund portfolios against market averages every three years- By 12.31.20</p>	<p>6.1-Endowment 6.1.1-Visit 500 alumni to introduce them to the Fraternity's strategic plan and activities, while moving them to solicit and support it: Foundation Staff- By 12.31.17</p> <p>6.1.2-Obtain 10 new Living Bond Society members: Foundation Staff- By 12.31.17</p> <p>6.1.3- Establish naming rights for the Presidents Leadership Conference: Foundation Staff- By 12.31.17</p> <p>6.1.4- Establish naming rights for the Leadership and Ethics Academy and associated programming: Foundation Staff- By 12.31.18</p> <p>6.1.5- Raise \$1.5 Million towards the Building on the Bond Campaign in cash and pledges: Foundation Staff- By 12.31.17</p> <p>6.1.6- Execute strategic plan for major gifts and overall Foundation purposes: Foundation Staff- By 12.31.17</p> <p>6.2-Annual Fund 6.2.1- Review all annual fund activities to ensure that they are utilizing all Fraternity communication channels and technologies: Foundation Staff - By 6.30.11</p> <p>6.2.2- Increase annual fund activities to generate an additional \$200k each year: DOAG- By 12.31.17</p> <p>6.3-Merchandising/Sponsorships 6.3.1- Introduce an online store in an effort to generate \$55k in conjunction with other licensed vendors each year until 2020, increasing by 5% each year : AEVP- By 12.31.11</p> <p>6.3.2- Acquire \$55k in sponsorships and partnership revenue for the Fraternity and Foundation by 2020, increasing each year by 10%: AEVP- By 12.31.12</p> <p>6.3.3-Acquire new loyalty credit card for Fraternity members: AEVP- By 8.31.17</p> <p>6.4-Loyalty and Cause Funding 6.4.1- Acquire 5,000 True Blue Society membership: SDE- By 6.30.20</p> <p>6.4.2-Raise \$1 million for Iron Phi by 2017: SDE- By 12.31.17</p>