

MISSION

To fulfill the principles of *The Bond* by providing our members a lifetime experience that allows each member to reach their own personal greatness

VALUES

Friendship, Sound Learning, and Rectitude

VISION

To be recognized as the premier fraternal leadership development society in North America





STRATEGIC INITIATIVE

GROWTH AND RETENTION

Execute strategies that prioritize the growth and retention of existing chapters and the expansion of new chapters.

GOALS

1.1 Growth: Expand the Fraternity's reach by increasing market share on existing campuses and pursuing expansion opportunities at new campuses, resulting in 250 chapters and 17,500 undergraduate members while considering opportunities for other membership models.

1.2 Culture: Create a culture of recruitment and retention that leads to diverse chapters filled with high-performing and purpose-driven members.

1.3 Retention: Improve the Fraternity's new member and chapter retention rates, resulting in an 85 percent new member retention rate and a chapter retention rate of 98 percent at sustainable campuses.

OBJECTIVES, TIMETABLES, AND RESPONSIBLE PARTIES

1.1 GROWTH

1.1.1 Execute an expansion strategy that culminates in 100-chapter installations, with fifty of those chapters being at campuses new to Phi Delta Theta by 2030.

1.1.2 Provide recruitment education and support that results in 80 percent of chapters maintaining a chapter size higher than their campus average by 2030.

1.1.3 Upon introduction of member development credentials, pilot expansion focus for unaffiliated prospects on campuses where we already have active chapters by utilizing program by 2023.

1.1.4 Utilizing and leveraging member development credentials, explore marketing and expansion strategies that include the targeting of sustainable non-four-year, degree bearing institutions in

addition to community colleges and transfer students feeding into campuses where Phi Delta Theta has a chapter by 2023.

1.2 CULTURE

1.2.1 Starting in 2021, conduct annual Dyad surveys and review member biographical information to understand the makeup of our undergraduate membership and lived experiences of current members of diverse identities on a regular basis.

1.2.2 Introduce recruitment track at the Kleberg Emerging Leaders Institute to complement the Phikeia Educators College by 2022.

1.2.3 Place and educate recruitment advisors at 100 percent of chapters by 2022 and retain annually.

1.2.4 Achieve 80 percent completion rate of PDT U recruitment chairmen certifications annually by 2022.



GROWTH & RETENTION

1.2.5 Determine and execute solution to gauge the lived experiences of prospective members of diverse identities by 2022.

1.2.6 To ensure membership at each chapter is reflective of campus dynamics in addition to providing programming to highlight the benefits of a diverse membership by 2022.

1.3 RETENTION

1.3.1 Based on chapter performance data, identify, engage, and intervene with chapters that have high risk of suspended operations by 2021.

1.3.2 Implement an annual chapter and campus assessment and accreditation program that enhances sustainability, identifies support needs, and compliments chapter dashboards to improve chapter, volunteer, and campus success 2022.

1.3.3 Create values-based membership criteria for chapters to use when evaluating potential new members that is integrated into customer relationship management solution by 2022.

1.3.4 Develop standardized chapter operating system that is focused on sustainability of the chapter via accreditation, compliance, and volunteer effectiveness by 2023.

1.3.5 Introduce a program that creates micro-support structures within the chapter and facilitates meaningful relationship building and chapter leader identification by 2023.



MEMBER DEVELOPMENT

STRATEGIC INITIATIVE

MEMBER DEVELOPMENT

Execute and promote transformational education that focuses on self-awareness, affirmation, motivation, and innovative leadership skills through on-demand technology and in-person program support for continued lifelong skill development and growth.

GOALS

2.1 Personal Growth: Provide a values-based membership experience that promotes leadership competencies and personal excellence.

2.2 Professional Readiness and Development: Offer an environment that enables a strategic advantage and the connections needed to achieve professional success in an increasingly diverse and inclusive world.

2.3 Fulfillment in Life: Provide the opportunity that all members can further develop and educate themselves through experiential and personal learning.

OBJECTIVES, TIMETABLES, AND RESPONSIBLE PARTIES

2.1 PERSONAL GROWTH

2.1.1 Reach a total of 60,000 members educated via conference programs, with the average being 8,500 members by 2030.

2.1.2 On an ongoing basis, seek diverse faculty members for facilitation and presentation opportunities.

2.1.3 Work to ensure live stream capability is in place for all in-person conferences for remote user engagement by 2021.

2.1.4 Infuse standardized, more efficient and effective new member education into member development program by 2021.

2.1.5 Develop, compile, and maintain existing chapter and member educational resources into a dynamic resource center within myPhiDelt by 2022.

2.1.6 Seek a third-party certification for member development credential by 2022.

2.1.7 For 2022, and all previous years, achieve on average 600 members (5 percent of membership) each academic year that have completed membership development credential and review scalability and program enhancement for full implementation to occur no later than 2030.

2.1.8 Introduce Diversity and Inclusion module for all members by 2021.

2.2 PROFESSIONAL READINESS AND DEVELOPMENT

2.2.1 Measure six-month post-graduation job or education placement of recent graduates by summer 2021 with the goal of obtaining a 90 percent placement rate by 2030 and build further strategy to improve success.



MEMBER DEVELOPMENT

2.2.2 All online and in-person education to be reviewed and adjusted to include cultural competency and implicit bias to prepare for post-graduation environments by 2021.

2.2.4 Arrange a mentorship platform that connects and routinely engages 25 percent of undergraduate members with alumni mentors by 2022.

2.2.5 Assess and determine high-impact opportunities for career development education and job placement by 2023 .

2.2.6 Utilize assessment tool that provides members with greater self-awareness and personal development to help promote a values-based, sustainable chapter leadership experience by 2024.

2.3 FULFILLMENT IN LIFE

2.3.1 Diversity and Inclusion Committee to define diversity and inclusion purpose statement by 2021.

2.3.2 Institute diversity and inclusion chapter officer as chaplain with training and resources to provide a platform for conversations and incentivize programming through awards system by 2021.

2.3.3 Offer educational tools assess emotional and physical health and enhance wellness to support a sustainable trajectory for personal leadership and greatness by 2022.

2.3.4 Offer educational tools to relate and connect to others in a safe, productive and satisfying manner by 2022.

2.3.5 Offer educational tools (proper financial management and planning) that prepare for post-graduation life by 2022.

2.3.6 Introduce diversity and inclusion chapter-wide education which is included in awards criteria by 2022.

2.3.7 Introduce Diversity and Inclusion Certificate for chapters and members which is included in awards criteria by 2030.



HEALTH & SAFETY

STRATEGIC INITIATIVE

HEALTH AND SAFETY

Instill a culture of group and individual health and well-being that is recognized and proven to be the safest fraternal organization in North America.

GOALS

3.1 Compliance: Create a culture of risk prevention that results in industry-leading compliance rates to promote alcohol-free housing and address hazing and the misuse and abuse of alcohol and other controlled substances.

3.2 Housing and Insurance: Promote the importance of safety assurance through state-of-the-art facilities with professionally trained and equipped local advisers.

3.3 Mental Health and Outreach: Provide comprehensive emotional health and wellness support and education.

3.4 Safety Recognition: Be publicly recognized as an organization focused on the health and safety of its members and host institutions.

OBJECTIVES, TIMETABLES, AND RESPONSIBLE PARTIES

3.1 COMPLIANCE

3.1.1 Decrease the frequency of liability claims by 75 percent and severity by 50 percent by 2030.

3.1.2 Provide 100 percent of membership bystander education yearly offering a menu of health and safety-focused programming through in-person and online education.

3.1.3 Utilize chapter performance metrics from accreditation and assessment to ensure that each chapter submits six event planning forms annually and is in compliance with the requirements of the Phikeia Program by 2021.

3.2 HOUSING AND INSURANCE

3.2.1 Through the completion of *Phi Delt 2030*, ensure our members are at their safest, the by-product will be the lowest fraternity insurance premium in the industry each year.

3.2.2 Placement of a trained and certified live-in advisor in 100 percent of all eligible house corporation-owned properties by 2030.

3.2.3 Promote sustainable habits to align with constituent desires for eco-friendly housing practices to achieve 75 percent of Green Star Certification in all house corporation-owned properties by 2030.



HEALTH & SAFETY

3.2.4 Decrease the frequency of property claims by 50 percent and severity by 75 percent by 2030.

3.2.5 Expand communication services efforts and utilization of General Headquarters technology capabilities to expand client base via feasibility studies, alumni communications, and capital campaigns by 25 percent by 2030.

3.2.6 Mandate all housing corporation properties are equipped with fire suppression systems and leak detection technology via a comprehensive multi-year phase-in program with potential incentives by 2022.

3.2.7 Establish a grant program to retrofit current social space into space that is conducive for education and leadership development, and chapter sustainability by 2024.

3.3 MENTAL HEALTH AND OUTREACH

3.3.1 Provide an emotional health and wellness program that equips our members, volunteers, and alumni with the skills and knowledge to help themselves and each other by 2021.

3.3.2 To impact societal behavioral norms, in partnership with the Max Gruver Foundation, introduce high school hazing education conducted by chapter leaders and volunteers by fall 2021.

3.3.2 Develop an online resource that includes all emotional health and wellness information, strategies, self-assessment, crisis hotline, and educational content by 2022.

3.3.4 Consider strategy to provide emotional health and wellness online resource to high school students through local chapter programming and all incoming, first time in college men on host campuses where we have a chapter or emerging chapter by 2023.

3.4.5 Review organizational legal ramifications of the prohibition of divisive symbols on chapters' premises and educate on the harmful impact of their presence by 2021.

3.4 SAFETY RECOGNITION

3.4.1 Obtain recognition by chapter host institutions as a fraternal leader within the realm of health and safety by 2030.

3.4.2 Receive accreditation and recognition of our health and safety programs by an appropriate entity such as the American College Health Association by 2030.



ENGAGEMENT

STRATEGIC INITIATIVE

ENGAGEMENT

Increase the frequency, quality, and breadth of communication tactics and programming to increase engagement opportunities with the Fraternity.

GOALS

4.1 Strategic Content Creation: Create and obtain world-class content that targets key audiences, is delivered through leading communication channels, and empowers advocates to champion Phi Delta Theta.

4.2 Parents: Create an environment that encourages parents to be well-informed and active participants in the success of Phi Delta Theta.

4.3 Alumni: Encourage alumni to connect with each other and learn about how they can support member development programming and other strategic initiatives of Phi Delta Theta.

4.4 Fraternity and Sorority Life: Create enhanced relationships that encourage collaboration and support through all levels of university administration in order to improve the greater Greek community.

4.5 Media: Be recognized by media outlets throughout North America as a leader within the fraternal movement through proactive outreach and relationship building.

OBJECTIVES, TIMETABLES, AND RESPONSIBLE PARTIES

4.1 STRATEGIC CONTENT CREATION

4.1.1 Build dynamic content calendar, identify and assign organization-wide content creators, and determine audiences and platforms by 2021.

4.1.2 By 2021 and on an ongoing basis, promote chapters that are succeeding with diversity and inclusion efforts and represent aspirational diverse identities in communication offerings.

4.1.3 Prepare chapters to communicate the benefits of diversity and inclusion initiatives occurring within the Fraternity to share with external stakeholders by 2021.

4.1.4 Consider updated brand position that enables the Fraternity to clearly articulate benefits to members and non-members alike by 2022.

4.1.5 Utilize new brand position to re-design and build website, apps, blog/vlog, social media, and podcast platforms by 2022.

4.1.6 Translate developed content into opportunities that add value to the member development credential by 2022.

4.2 PARENTS

4.2.1 Understand structures of current Parents Clubs and create resources that facilitate the development of Parents Clubs at 75 percent of our chapters by 2030.

4.2.2 Empower parents to serve on chapter advisory boards and house corporations so that they make up 20 percent of the Fraternity's chapter-level volunteer corps by 2030.

4.2.3 Develop a focused collection of content to educate the parents of our members and potential new members about the Fraternity and the opportunities to be involved by 2021.

4.2.4 Build parent advocacy by challenging the Parent Council and members of the Parents Clubs to develop strategic content by 2021.

4.3 ALUMNI

4.3.1 Invest in technology solution connected to a central database that: improves accuracy of member contact information, allows alumni to find and network with each other, and offers the ability for chapter, club, and volunteer leaders to communicate with and recruit alumni by 2021.

4.3.2 Transition the features of the Phi Delt Network App into the myPhiDelt portal to drive portal usage, local alumni event creation, and overall alumni engagement by 2021.

4.3.3. Determine engagement metrics that identify alumni who are most likely or have the desire to advance with the Fraternity through club involvement, as donors, volunteering as career coaches, and conference faculty opportunities by 2021.

4.3.4 Develop PhiClass initiative that connects alumni with chapters in-person or virtually to continue to add lifelong value to the Phi Delta Theta experience by 2021.

4.3.5 Identify top twenty Phi Delt markets based on density and engagement, and work to develop and support model alumni activity by 2024.

4.4 FRATERNITY/SORORITY LIFE

4.4.1 Create plan that enhances relationships that encourage collaboration and support through all levels of university administration to improve the greater Greek community while driving chapter sustainability by 2021.

4.4.2 Create campus-based advisory council that helps guide the Fraternity in its strategies and proactively build great partnerships with our current and potential host institutions by 2021.

4.4.3 Ensure conference faculty is made up of 20 percent non-Phi Delt university partners by 2021.

4.4.4 Communicate chapter performance data through a chapter dashboard quarterly and provide opportunities for campus-based professionals to validate data and provide additional feedback by 2021.

4.4.5 Build and maintain meaningful university administration relationships at sixty campuses where Phi Delta Theta does not exist by 2022.

4.4.6 Develop recognition program for campus-based professionals by 2024.

4.5 MEDIA

4.5.1 Create and maintain database of media outlets and journalists who report on Greek life and Phi Delta Theta by 2021.

4.5.2 Develop proactive media engagement plan in order to build relationships with a prioritized list of media outlets and journalists by 2021.

4.5.3 Build marketing and distribution plan to deliver positive Phi Delta Theta and LiveLikeLou content to local and national media outlets by 2021.

4.5.4 Understand quantity, reach, and sentiment of current media coverage and improve positive news by 50 percent by 2025.



SUPPORT

STRATEGIC INITIATIVE

SUPPORT

Create the optimal infrastructure, volunteer, and staff support model that prioritizes servant leadership and enables all chapters and members to reach their full potential and further the strategic initiatives of the Fraternity.

GOALS

5.1 Volunteer Mobilization: Actively recruit, manage, retain, and evaluate highly-trained volunteer corps to best support chapters and members.

5.2 Internal Talent: Adjust structure and enhance culture to ensure optimal performance and the acquisition, development, and retention of a committed and talented GHQ staff.

5.3 Technology and Data: Feature a cutting edge, single-source, user-centered platform and solution that facilitates good contact information and best serves the needs of staff, volunteers, and members.

OBJECTIVES, TIMETABLES, AND RESPONSIBLE PARTIES

5.1 VOLUNTEER MOBILIZATION

5.1.1 By 2021, create an alumni recruitment, recognition and retention plan that focuses on sustainability, shows appreciation to volunteers and drives satisfaction and continued involvement, and retains highly assessed volunteers at 100 percent year-to-year.

5.1.2 After installation in 2021, effectively utilize organization-wide the cutting-edge, single-source, user-centered capabilities of Salesforce and the ChapterSpot portal to facilitate good contact information and best serve the needs of staff, volunteers, and members.

5.1.3 Develop key performance indicators and corresponding tactics that positions the Province President Program to drive chapter and CAB success and supports the strategic initiatives of the Fraternity by 2021.

5.1.4 Beginning in 2021 and on an ongoing basis, provide quarterly educational touchpoints for house corporation members and execute bi-annual House Corporation Summits.

5.1.5 Include diversity and inclusion education for all province presidents and chapter advisory board members and offer in-person education for all volunteers at conferences to support the transition of chapter membership being reflective of campus dynamics while recruiting a corresponding volunteer corps by 2021.

5.1.6 Educate Fraternity volunteers on ideal volunteer structure for long-term chapter sustainability by 2022 through quarterly educational touchpoints.



SUPPORT

5.1.7 Determine succession planning process and ideal province president structure to best support the sustainability of chapters by 2022.

5.1.8 Instill a firm understanding in volunteers of the Foundation's purpose, impact, and goals so they know the multiple ways they can contribute and why it's important by 2023.

5.2 INTERNAL TALENT

5.2.1 Develop a high-functioning, strategy-driven chapter support model that intentionally focuses on hiring, location, and outcomes for chapter, volunteer, and campus success and sustainability by 2021.

5.2.2 By 2021 and on an ongoing basis, within GHQ, Diversity and Inclusion education occurs annually for foundational learning and applied education to specific roles to support the transition of chapter membership, and being reflective of campus dynamics while recruiting a corresponding team.

5.2.3 Document tasks for each General Headquarters position for succession purposes and review it annually by 2021.

5.2.4 Review and seek 360 degree feedback about human resource practices on an annual basis to build a GHQ staff culture and structure that recruits great people, recognizes their successes, and retains top performers at all levels by 2022.

5.2.5 Review and create alternative solution to current human resource practices and delegation of duties with a focus on best serving the employee and compliance by 2022.

5.2.6 Institute annual benchmarking and feedback process to ensure competitive employee offerings including, but not limited to, work arrangement, compensation, benefits, structure, and professional development by 2022.

5.2.7 Seek third-party endorsement as industry and/or regional employer by 2025.

5.3 TECHNOLOGY AND DATA

5.3.1 Acquire more member email addresses (47 percent to 63 percent), physical addresses (78 percent to 85 percent) and mobile numbers (27 percent to 50 percent); increase unique parent records (48 percent to 90 percent) by 2030.



FUNDING

STRATEGIC INITIATIVE

FUNDING

Implement strategies that enable Phi Delta Theta Fraternity, Phi Delta Theta Foundation, and LiveLikeLou Foundation to successfully fulfill their mission.

GOALS

6.1 Major Giving: Through capital campaign planning and sound execution, continue a major gift initiative to grow the Foundation-managed assets, becoming the largest fraternity foundation in the industry. To achieve this goal, we will raise \$12 million through documented campaign commitments and cash in the areas of people support, health and safety, and membership development. In addition, the campaign will work to support growth and participation in LiveLikeLou, along with other qualifiable expenses.

6.2 Planned Giving: Through capital campaign initiatives, including a targeted, planned giving survey coupled with advancement officer follow-up, realize \$4 million in planned gifts during the duration of the campaign (designated or unrestricted) and promote and grow the Living Bond Society membership by increasing documented planned and deferred gift participation to \$12 million (planned gift registry).

6.3 Annual Giving (The Phi Delt Fund): Enhance annual fund program through donor retention, donor acquisition, and lapsed donor recovery to build lifelong donors while providing a funding stream that supports Foundation operations and underfunded programming by raising \$9 million during the duration of the campaign.

6.4 Innovation Funds: Although a component of annual giving, raise \$5 million in innovation funds in collaboration with the advancement officer team supporting any of the three campaign funding initiatives.

6.5 LiveLikeLou: Build a sustainable infrastructure and the momentum to meaningfully engage Fraternity members in the ALS cause, raise more than \$13 million to support ALS patients and their families and research to find a treatment or a cure, and measurably leave ALS better than we found it by 2030.

6.6 Alternative Revenue: Strengthen membership value proposition, housing stock, and organizational capacity by generating \$500k annually through affinity programs, royalties, grants, and other alternative activities.

6.7 Financial Solutions: Enhance the enterprise functionality/operations, security, and investment practices of the Fraternity and related entity funds.



FUNDING

OBJECTIVES, TIMETABLES, AND RESPONSIBLE PARTIES

6.1 MAJOR GIVING

6.1.1 Create strategy and tactics to properly leverage and steward remaining Shaffer Fund prior to launch of *Campaign 2030*.

6.1.2 Develop a targeted approach through prospect research that will drive major gift operations and priorities prior to launch of *Campaign 2030*.

6.1.3 Ensure that organizational structure and staff development, training, and retention support campaign success prior to launch of *Campaign 2030*.

6.1.4 By 2024, revisit campaign case statement, fundable targets and progress goals to reassess final five years of campaign.

6.2 PLANNED GIVING

6.2.1 Promote Living Bond Society through advancement communications, making stewardship and actively managing potential Living Bond Society prospects a substantial component of *Campaign 2030*.

6.3 ANNUAL GIVING

6.3.1 Through 2030, increase Sword and Shield Society membership at all levels by an average of 3 percent annually (loyalty society).

6.3.2 By 2030, raise \$9 million unrestricted Phi Delt Fund dollars during the duration of the campaign.

6.3.3 Create strategies through campaign planning to acquire new donors through unique engagement and giving opportunities prior to launch of *Campaign 2030*.

6.3.4 By 2021 and on an ongoing basis, increase young alumni giving by converting 15 percent of Knights of Pallas donors into Foundation donors and marketing of young alumni Trustees Roundtable.

6.3.5 By 2030, Increase volunteer giving to the Phi Delt Fund to 30 percent of all active Phi Delta Theta Volunteers.

6.3.6 Combat donor attrition through the creation of a sustained giving society that stewards current members and cultivates new members prior to launch of *Campaign 2030*.

6.3.7 Expand the current Knights of Pallas undergraduate giving program to include increased focus on education and capturing philanthropic interests prior to launch of *Campaign 2030*.

6.4 INNOVATION FUNDING

6.4.1 Each September, CEO assesses needs for strategic funding to be applied to forthcoming Foundation fiscal year budget and subsequent Fraternity budget and provide future needs to advancement officers.



FUNDING

6.5 LIVELIKELOU

6.5.1 By 2030, raise more than \$13 million through engagement of 80 percent of chapters and alumni clubs via personal efforts (Iron Phi), team events, and community appeals; expand the menu of creative giving options (e.g., planned giving and non-Phi appeals such that 25 percent of annual funds raised come from private foundations, corporations, memorial giving, etc.)

6.5.2 By 2030, build a sustainable infrastructure of talented people, cutting-edge technology, and an annual operating fund which can provide \$50,000 to empower consistent fundraising success and engage Fraternity members in the ALS cause and the purpose of LiveLikeLou.

6.5.3 By 2030, support ALS patients and their families through a \$4 million fund that grants forty Iron Horse Scholarships/year; build national partnerships and make annual gifts to support younger dependents of ALS families; and engage 50 percent of the Fraternity's undergraduate chapters in annual volunteerism for ALS families.

6.5.4 By 2030, support ALS research for a treatment or a cure through a \$8 million fund that pays out \$400,000/year in grants and national partnerships with promising scientists, research institutions, and other life science companies.

6.6 ALTERNATIVE REVENUE

6.6.1 Review current affinity and licensing relationships to maximize current use of brand, access of quality merchandise and services to members while increasing current level of financial support by 2021.

6.6.2 Launch True Blue Society review to maximize program potential for alumni engagement, Foundation support, and organizational value by 2022.

6.6.3 Create committee to discover and build relationships with entities that provide grants including, but not limited to, the areas of health and safety and regional enrichment that could underwrite the Fraternity's efforts to make a societal impact by 2024.

6.7 FINANCIAL SOLUTIONS

6.7.1 Analyze all potential eligible funding requirements to inform campaign development strategy, goals, and execution timeline prior to launch of new campaign by 2021.

6.7.2 Review Phi Delta Theta, Inc. and affiliated organizations' asset management practices and structure by 2022.

6.7.3 In an effort to establish a national housing corporation, increase housing designated assets to \$25 million to have adequate funding and/or third-party investor ready to assist distressed properties to retain and enhance real estate assets by 2025.



PHI DELTA 2030
Strategic Vision of the International Fraternity