



Phi Delt 2030: Strategic Vision of the International Fraternity

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.

Growth and Retention

Strategic Initiative

Execute strategies prioritizing the growth and retention of existing chapters and expanding new chapters.

Goals

1.1 Growth: Expand the Fraternity's reach by increasing market share on existing campuses and pursuing new expansion opportunities at sustainable campuses, resulting in 230 chapters and 18,480 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 who reflect campus demographics.

1.3 Retention: Improve the Fraternity's retention rates, resulting in a 90 percent new member retention rate and a 98 percent chapter retention rate.

Objectives, Timetables, and Responsible Parties

1.1 Growth

1.1.1 Provide recruitment education and support, resulting in 80 percent of chapters maintaining a chapter size higher than their campus average by 2030.

1.1.2 Execute an expansion strategy focused on campus sustainability that culminates in ninety chapter installations, with forty-five of those chapters at campuses new to Phi Delta Theta by 2030.

1.1.3 Conduct research to identify existing campuses that have partnerships with local two-year degree-granting institutions or other auto-admission programs. After investigation, conduct a pilot program connected to recruiting non-fulltime students to chapters by 2025.

1.1.4 Develop and implement a volunteer role that places a regional expert to promote best practices and offer education in recruiting new members by 2025.

1.1.5 Explore engagement and membership models for students not attending traditional four-year institutions or joining a Phi Delta Theta chapter by 2025.

1.2 Culture

1.2.1 Starting in 2021, conduct annual Dyad surveys and review member information to understand the demographic makeup of the Fraternity's undergraduate membership and the lived experiences of current members of diverse identities.

1.2.2 Offer ongoing Recruitment Workshops, infuse recruitment education into all Fraternity educational programs, and provide programming to highlight the benefits of a diverse membership by 2021

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

1.2.4 Achieve an 80 percent completion rate of PDT U recruitment chairmen classroom module annually by 2022.

1.2.5 Determine and implement an approach to gauge the lived experiences of prospective members of diverse identities by 2022.

1.2.6 Ensure membership at each chapter is reflective of campus demographics by 2030.

1.3 Retention

1.3.1 Conduct an annual chapter and campus review at the conclusion of the academic year. Factors to be considered will be chapter accreditation status, Dyad data, university sustainability, and geographical demographic trends. The review will result in revised and complementary strategies to improve chapter, volunteer, campus, and growth success by 2023.

1.3.2 Annually collect 20,000 potential new member leads through myPhiDelt using values-based membership criteria that will be integrated into the customer relationship management solution by 2024.

1.3.3 Increase, through intentional support strategies, the overall operational quality and sustainability of chapters, resulting in a four percent increase annually of chapters earning Silver and Gold Stars in the chapter accreditation program through 2030.

Member Development

Strategic Initiative

Execute and promote transformational education focusing 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 networking opportunities and career services enabling members to succeed professionally in an increasingly diverse and inclusive world.

2.3 Personal Wellness and Health: Assist members in finding personal greatness by building physical and mental fitness and strength.

Objectives, Timetables, And Responsible Parties

2.1 Personal Growth

2.1.1 Provide best-in-class in-person educational experiences for 2,300 attendees annually by 2030.

2.1.2 Seek diverse faculty members for facilitation and presentation opportunities.

2.1.3 Infuse a standardized, more efficient, and effective new member education through the use of incentives and disincentives into member development programs by 2026.

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

2.1.5 Seek a third-party certification for member development credentials by 2022.

2.1.6 Starting in 2025, fifty members each year participate in an optional, supplemental leadership opportunity within Phi Delta Theta. This includes the peer mentor program at conferences and the chapter improvement project through Pursuit of Greatness.

2.1.7 Develop and pilot supplemental micro membership experience for alumni and undergraduate members by 2024.

2.1.8 Beginning in 2023, 45 percent of officers complete officer certification courses annually, totaling 7,200 certifications completed by 2030.

2.1.9 Utilize SMS/MMS engagement platform to send push education to chapter officers to increase their interaction with existing resources within myPhiDelt and PDT U.

2.1.10 Provide chapters with pre-packaged programming options and facilitation guides related to mental health, diversity and inclusion, and career development by 2026 and track utilization of programs through the chapter accreditation Program with the goal of all chapters hosting at least one related program per semester by the end of 2027.

2.1.11 Create a moderated repository of peer-to-peer educational content that addresses key areas of chapter operations and emphasizes best practices among chapters. Relevant content will be created for each officer position by 2026.

2.1.12 Utilize conference assessments, Salesforce, Braze, and Intellum to implement relevant feedback loops related to overall experience and support for conference attendees, chapter officers, and undergraduates by 2025.

2.2 Professional Readiness and Development

2.2.1 Introduce professional and personal greatness credentialed certifications by 2021 and continue to adjust to ensure relevancy and industry-leading standing through 2030.

2.2.2 Measure the 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 building further strategies to improve success.

2.2.3 Define diversity and inclusion statement and introduce diversity and inclusion PDT U module, chapter programming, and include in awards criteria by 2022.

2.2.4 Institute diversity and inclusion chapter officer as the chaplain by 2022 and provide training, resources, a platform for conversations, and incentivized programs by 2022.

2.2.5 Develop a mentorship program that connects and tracks pairings between alumni and undergraduates with the goal of having five hundred pairings per year by 2030.

2.2.6 Assess and determine high-impact opportunities for career development education and job placement by 2024.

2.2.7 Include career development components in each conference curriculum and province retreat guide and deliver career readiness education during peak job and internship seasons annually.

2.3 Personal Wellness and Health

2.3.1 Through in-person educational opportunities and required bystander education PDT U modules, ensure that all chapter leaders are given tools to acknowledge their mental health challenges and how to refer others to proper avenues of support.

2.3.2 Introduce a personal wellness plan by 2021 and continue to adjust to ensure relevancy and industry-leading standing through 2030.

2.3.3 Determine a third-party partnership to provide preventative and/or additive mental health services by 2022.

2.3.4 Determine programming and partnerships to promote healthy habits and behaviors activities by 2022.

2.3.5 Establish a plan to support house corporations with initiatives to dedicate spaces that foster improved mental health and wellness by 2024.

Health and Safety

Strategic Initiative

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: Ensure a safe and appealing living environment in a post-COVID world through state-of-the-art facilities with professionally trained and equipped local advisers.

3.3 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 Throughout the completion of *Phi Delt 2030*, maintain a general liability loss ratio of at least 50 percent yearly with a goal of reaching a ten-year average of 35 percent or lower in 2030.

3.1.2 Provide annual bystander education to 100 percent of undergraduate members through a health- and safety-focused in-person and online education menu.

3.1.3 Utilize chapter performance metrics from accreditation and assessment to ensure that each chapter submits six event planning forms annually and complies with the Phikeia program's requirements by 2021.

3.2 Housing and Insurance

3.2.1 Through the completion of *Phi Delt 2030* and ensuring our members are at their safest, we achieve the lowest annual fraternity insurance premium in the industry.

3.2.2 Support training and placement of certified live-in leadership advisers in 100 percent of all eligible house corporation-owned properties by 2030.

3.2.3 Create a standard live-in leadership adviser (LILA) job description and assess the effectiveness of the LILA program against that job description by 2023.

3.2.4 Using data from the Dyad Brotherhood Assessment and other relevant data sources, measure the impact of live-in advisers by 2024.

3.2.5 Throughout the execution of *Phi Delt 2030*, maintain a property policy loss ratio of at least 60 percent yearly to reach a ten-year average of 50 percent or lower in 2030.

3.2.6 Mandate all housing corporation properties be 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 conducive to education, leadership development, and chapter sustainability by 2024.

3.2.8 Execute a communication strategy that promotes alumni engagement and support needs for North Hall Property-owned facilities by 2024.

3.2.9 Launch the Phi Delta Theta property portal at the 2024 House Corporation Summit, including subsequent promotion to house corporation members. The portal will acquire information from house corporation members, including house corporation officers and articles of incorporation, employee records, rent amounts, other student-related charges, etc. This portal will continue to evolve up until 2030 and beyond.

3.3 Safety Recognition

3.3.1 Obtain health and safety recognition as a fraternity leader from chapter host institutions by 2030.

3.3.2 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

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 Families:** Create an environment that encourages families to be well-informed and active participants in Phi Delta Theta's success.
- 4.3 Alumni:** Cultivate a highly engaged and supportive alumni base that is connected to one another and increasingly contributing to the growth, support, and funding initiatives of the organization at both the international and local levels, guided by data-driven engagement metrics that inform and enhance our strategies.
- 4.4 Fraternity and Sorority Life:** Create enhanced relationships that encourage collaboration and support through all levels of university administration 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 Utilize data to create milestone- and place-based communication and content for undergraduates and alumni, making every member feel valued and engaged by mid-2026.
- 4.1.2 Integrate outreach across multiple platforms, including email, SMS, social media, direct messages, and web, into Braze, where possible, to drive a member-centric engagement strategy based on engagement data across Braze and Salesforce CRM by early 2027.
- 4.1.3 Increase member-generated content to one hundred stories or posts annually through increased engagement with chapter and member accounts on digital channels by 2027.
- 4.1.4 Coach communications chairs on chapter-specific content strategy to drive recruitment, alumni relations, and a strong values-aligned digital presence quarterly by 2026.
- 4.1.5 Integrate engagement metrics and personas into communication strategies and tactics to drive more relevant and timely communications by the beginning of 2026.
- 4.1.6 By 2026, Create member and non-member personas based on market research to determine the wants and needs of different groups related to leadership development and career readiness programs.

4.1.7 Starting in 2025, demonstrate the value of Phi Delta Theta's in-person educational events while encouraging chapters to budget appropriately to support their members' experiences through enhanced communication, planning, and promotion of Leadership Funds.

4.2 Families

4.2.1 Understand structures of current parent clubs, create resources that facilitate their development, recognize those that are succeeding, and have them in place at 75 percent of chapters by 2030.

4.2.2 Empower family members to serve on chapter advisory boards and house corporations to make up 20 percent of the Fraternity's chapter-level volunteer corps by 2022.

4.2.3 Develop a focused collection of content that educates members' and potential new members' families about the Fraternity and involvement opportunities by 2021.

4.2.4 Build advocacy from family volunteers through strategic content by 2021.

4.2.5 Create and promote an alumni initiate model for fathers/guardians of members by 2024.

4.3 Alumni

4.3.1 Utilize myPhiDelt to increase alumni access to fraternity programs, volunteerism, and personalized engagement and connection opportunities throughout the duration of *Phi Delt 2030* with a goal of increasing alumni engagement in myPhiDelt 10 percent annually.

4.3.2 Determine specific factors within engagement metrics that aid in the creation of alumni segments who are most likely to advance into traditional ways of engagement encompassed within the True Blue Society and new, non-traditional ways of engagement, such as mentoring by 2025.

4.3.3 Pilot alumni gathering within a defined market to stimulate and activate the base for general and targeted purposes by 2022.

4.3.4 Grow the relaunched True Blue Society annually by 3 percent starting in 2025, resulting in 7,000 alumni actively volunteering, counseling, or financially supporting Phi Delta Theta and its members by 2030.

4.3.5 Implement local event templates, support, and marketing structures that drive alumni engagement and organizational affinity by August 2024.

4.3.6 Continue the development of the First Thursdays with the Phis program, including GHQ-level updates to leaders, seamless check-in, growth of locations to one hundred, and an average of 1,000 Phis participating monthly or quarterly by 2026.

4.3.7 Relaunch the alumni secretary position and advisory role as the alumni engagement officer and adviser who collaborates with General Headquarters to foster stronger relationships and contact information between the chapter and alumni through routine General Headquarters communications and operational and marketing support by the end of 2025.

4.3.8 Create and distribute a new alumni engagement toolkit for chapters that outline available event planning templates, support, and communication mediums by 2025.

4.3.9 Test, launch, and iterate ongoing for all alumni by the end of 2025 personalized engagement related to chapter anniversary, chapter milestones, and initiation anniversary with a focus on driving re-engagement amongst brothers.

4.3.10 Test the viability of myPhiDelt as an initial reconnection hub for alumni by late 2026.

4.3.11 By 2028, 70 percent of chapters are intentionally hosting an annual alumni-focused event or reunion supported by the General Headquarters suite of services but locally managed while reported on through the chapter accreditation program.

4.3.12 Encourage and support alumni events around re-installations, young alumni gatherings, and young chapter milestones via collaboration and simplified event templates for local execution by the beginning of 2027

4.4 Fraternity/Sorority Life

4.4.1 Create and execute a plan that enhances and encourages collaborative and supportive relationships through all levels of university administration to improve the greater Greek community and drive chapter sustainability by 2021.

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

4.4.3 Ensure conference faculty comprises 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 forty-five campuses where Phi Delta Theta does not exist by 2022.

4.4.6 Launch a recognition program for campus-based professionals and partners to encourage sustained relations and further growth with campus parties by 2024.

4.5 Media

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

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

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

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

4.5.5 Review existing media engagement practices and norms and adjust accordingly to ensure continued relevance and utility while integrating new practices and norms for emerging media by the end of 2025.

Support

Strategic Initiative

Create the optimal infrastructure, volunteer, and staff support model prioritizing servant leadership. This model will enable all chapters and members to reach their full potential and further the Fraternity's strategic initiatives.

Goals

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

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.

5.4 People: Create, promote, and institutionalize opportunities to highlight, track, engage, and involve high-performing members in meaningful roles within the Fraternity.

Objectives, Timetables, and Responsible Parties

5.1. Volunteer Mobilization

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

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

5.1.3 Enhance key performance indicators and corresponding tactics to implement a scorecard that positions the province president program to drive chapter and CAB success and supports the strategic initiatives of the Fraternity by 2025.

5.1.4 Provide quarterly educational touchpoints for house corporation members and execute bi-annual House Corporation Summits, beginning 2021 and ongoing.

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 the ideal volunteer structure for long-term chapter sustainability by 2022 through quarterly educational touchpoints.

5.1.7 Determine the 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.

5.1.9 Create an action plan and goals to increase educational and engagement opportunities for house corporations and other housing volunteers through content creation and in-person and virtual learning sessions by 2024.

5.1.10 Create a province president portal within myPhiDelt that collects quarterly reports, drives support initiatives, and provides the province president with a snapshot of performance data from chapters within the province by 2024.

5.1.11 Test a regional networking and engagement volunteer focused on the success of alumni engagement, First Thursdays, mentoring, and True Blue Society initiatives in three provinces throughout 2025.

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 Host diversity and inclusion education annually within GHQ to offer foundational learning and applied education, support the diversification of chapter membership, and encourage staff diversification by 2021.

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 annually 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 solutions to current human resource practices and delegation of duties focusing 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 an industry and/or regional employer by 2025.

5.2.8 To ensure the sustainability of proposed programs and initiatives considered substantial, implement protocols that require developing a business plan for each by 2022. The business plan will consider goals, ongoing financial impact (revenues and costs), required staff and resources, and benchmark objectives to measure effectiveness.

5.2.9 Develop guidelines for handling unexpected situations that are considered substantial and serious that may adversely impact the Fraternity and perform biannual scenario activity by 2023.

5.2.10 Based on the various efforts elsewhere in this plan to identify potential members' amenable service within Phi Delta Theta, consider and identify potential staff members.

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) by 2030.

5.3.2 Implement a Net Promoter Score (NPS) system that measures the overall satisfaction of members throughout critical contact points by 2025 and use results to determine opportunities for organizational improvement.

5.3.3 Using the Net Promoter Score system, maintain the highest industry undergraduate satisfaction level throughout 2030.

5.3.4 Utilize data from the technology stack and Dyad Strategies partnership to measure plan performance against objectives quarterly by 2023.

5.3.5 Determine affinity and engagement score based on historical and prospective interaction with the organization by December 2022.

5.3.6 Institute annual foundational data literacy education for the entire staff and applied learnings by applicable department and individual by 2023.

5.3.7 Update all platform's terms of use and privacy policies and implement data sharing policy and vendor/volunteer use agreements by 2023.

5.3.8 Implement a technology advisory committee focused on core and emerging technologies that aid the organization in its continued implementation of value-added technology to the member experience by 2024.

5.3.9 Launch new Phi Delt Store in partnership with Enrichly and Collegiate Licensing Company in 2024 and consider integrating store opportunities and future Enrichly products into marketing, engagement, and chapter support strategies annually.

5.3.10 Introduce a scalable alumni newsletter program that all chapters can leverage at no cost in myPhiDelt with enhanced options for chapter-based content integration into GHQ communications systems or paid print newsletter by 2025.

5.3.11 Introduce a strategic initiatives dashboard in myPhiDelt that informs chapter officers, volunteers, and alumni on the chapter's standing related to recruitment, alumni engagement, facility quality, upcoming chapter milestones, chapter accreditation program, and strategic organizational initiatives by 2026.

5.3.12 Prepare the General Headquarters data infrastructures and technology stacks to allow for the intentional implementation of artificial intelligence products, services, workflows, and agentic solutions by 2025.

5.4 People

5.4.1 By 2022, implement the member of the year program as part of the new awards program, adding these winners to future volunteer, live-in leadership adviser, and staff recruiting efforts.

5.4.2 By mid-year 2025, recreate the Rising Phi program by identifying common characteristics of Rising Phis through data analysis and pre-building segmented audiences in Salesforce. Continue to educate staff and volunteers on tracking measures in Salesforce and add Rising Phi indicators into

myPhiDelt for volunteer visibility and reporting. Equip staff and volunteers with training on discovering Rising Phis, understanding their shared traits, and correctly designating members as such.

5.4.3 By 2022, provide an opportunity for undergraduate members to communicate their campus-based leadership experience through the myPhiDelt membership portal.

5.4.4 By 2022, use existing volunteer indicators and the chapter advisory board assessment to identify areas of need, highlighting those needs through social media and on the Phi Delta Theta website and tracking leads through the volunteer CRM feature in Salesforce.

Funding

Strategic Initiative

Implement strategies that enable Phi Delta Theta Fraternity, Phi Delta Theta Foundation, Iron Phi Foundation, and Live Like Lou Foundation to fulfill their mission successfully.

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, 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 Live Like Lou, 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 the 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 Live Like Lou: 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 Iron Phi: Increase Iron Phi fundraising by 10 percent each year, resulting in \$1.5 million raised annually and the growth of the Fraternity's community of philanthropists committed to raising funds for the fight against ALS and providing meaningful support to leadership programming and scholarships.

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

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

Objectives, Timetables, and Responsible Parties

6.1 Major Giving

- 6.1.1 Create strategy and tactics to leverage properly and steward the remaining Shaffer Fund prior to the launch of *Campaign 2030*.
- 6.1.2 Develop a targeted approach through prospect research that will drive major gift operations and priorities prior to the launch of *Campaign 2030*.
- 6.1.3 Ensure that organizational structure and staff development, training, and retention support campaign success prior to the launch of *Campaign 2030*.
- 6.1.4 By 2024, revisit the campaign case statement, fundable targets, and progress goals to reassess the final five years of the campaign.
- 6.1.5 Introduce chapter officer funds that provide undergraduate scholarship and travel support to designated officers by 2024.

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 campaign's duration.
- 6.3.3 Create strategies through campaign planning to acquire new donors through unique engagement and giving opportunities prior to the launch of *Campaign 2030*.
- 6.3.4 Increase young alumni giving by converting 15 percent of Knights of Pallas donors into Foundation donors and marketing of young alumni Trustees Roundtable by 2021 and ongoing.
- 6.3.5 Increase volunteer giving to the Phi Delt Fund to 30 percent of all active Phi Delta Theta volunteers by 2030.
- 6.3.6 Combat donor attrition through the creation of a sustained giving society that stewards current members and cultivates new members prior to the launch of *Campaign 2030*.
- 6.3.7 Expand the current Knights of Pallas undergraduate giving program to include an increased focus on education and capturing philanthropic interests prior to the launch of *Campaign 2030*.

6.4 Innovation Funding

- 6.4.1 Each September, the CEO assesses the need for strategic funding to be applied to the forthcoming Foundation fiscal year and subsequent Fraternity budgets and provides future needs to advancement officers.
- 6.4.2 Raise and distribute \$250,000 to new members of Phi Delta Theta who are first-generation college students.

6.5 Live Like Lou

6.5.1 By 2030, raise more than \$13 million through the 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 that can provide \$50,000 to empower consistent fundraising success and engage Fraternity members in the ALS cause and the purpose of Live Like Lou.

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 Iron Phi

6.6.1 To promote individual health and wellness through charity athletics, grow Iron Phi participation by 10 percent annually, resulting in 3,000 annual registrations by 2030.

6.7 Alternative Revenue

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

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

6.7.3 Create a 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.

6.8 Financial Solutions

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

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

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