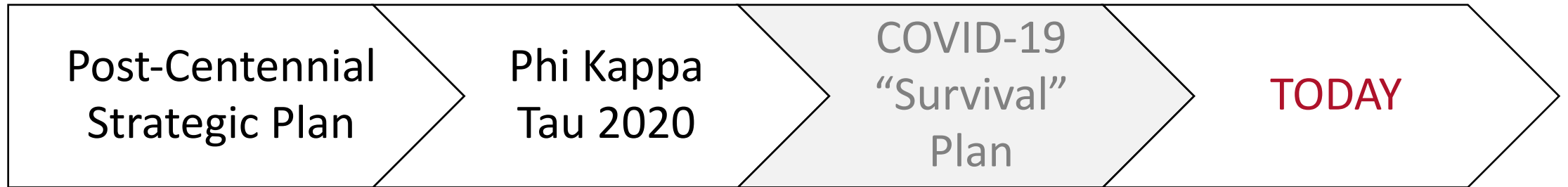




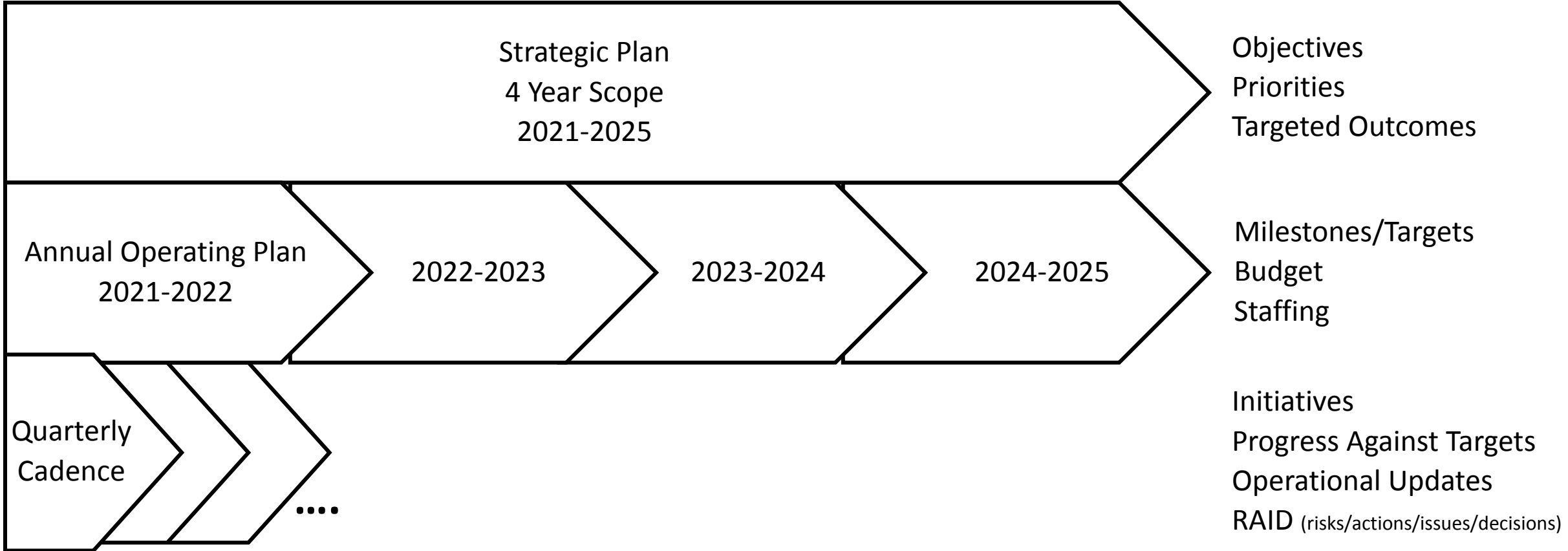
About the Strategic Plan

# How We Got Here



- Analysis of prior plans – what worked/didn't work
- Environmental assessment
- Baselining of current state
- Envisioning of future state
- Survey inputs from stakeholder groups
- Developed strategic plan**

# Phi Kappa Tau Planning Process



# Scope and Focus of the Strategic Plan

The strategic plan articulates the most critical objectives and outcomes required for the organization to achieve its vision.

It is a long-term *outcome-oriented* plan that informs more frequent and detailed planning and execution which occurs on an annual and quarterly basis.

What it is not:

It does *not* capture everything that the organization does or could do.

It can *exclude* items that (while valuable) don't require focus or change.

It is *not* a wish list of many potential projects or programs.

It does *not* include all the KPI's that the organization should measure.

*Instead*, it is designed to drive focus, alignment, and resource allocation.



# Methodology: Objectives & Key Results (OKRs)

Widely adopted technique that helps organizations **define, align, and drive strategic priorities.**

## OBJECTIVES

Statement of intention, focus, and direction over time.

- 
- ✓ Communicate the 3-5 things you want to achieve for the organization
  - ✓ Declare the big idea and “why”
  - ✓ Inspire and motivate people with sense of purpose so they want to be on board

## KEY RESULTS

Organizational outcomes that quantify success in a specific time period.

- 
- ✓ 3-6 results for each objective that quantify real success and value
  - ✓ Define the best possible results, not most probable
  - ✓ Always concretely measurable. Include numbers quantifying an end state when possible

# Stakeholder Feedback

- Stakeholders across the organization individually completed a questionnaire as input into development of the strategic plan:
  - Survey input highlighted that members see strength in PKT's **brotherhood** as the conduit to personal/**professional development** and **diverse lifelong relationships**.
  - Survey respondents indicated they would like the organization to pursue **aggressive growth goals**. (67% of respondents specifically mentioned Growth when asked where they would like to see PKT in 10 years.)
  - Why Growth?
    - **Extends the reach** of our mission and brotherhood
    - Provides the **resources to achieve** our mission
    - Allows us to deliver **more value** to members
    - More efficiently allocates the organization's fixed costs and non-value-creating costs
    - Increases **stability** and **permanence** for the organization
  - In order to meet those goals, respondents indicated that the organization should focus on better **communication** and **alignment**, delivering more **value** to members, **recruitment/expansion**, **alumni engagement**, and improved **operational execution**.



# Cultural Assessment

- By and large, the brotherhood personally cares about Phi Kappa Tau, is proud of its association with the fraternity, and wants to see it successful.
- There is a sense that Phi Tau is **unique** and values **inclusion** – carrying forward the founding story of the organization as a maverick Non-Fraternity Association. There is opportunity to build on this idea to **differentiate** in the way that we position PKT relative to other fraternities and **rally our members** to contribute to our success.
- Given the diversity and decentralization of our local undergraduate and alumni groups, our strategies should **leverage local connections, creativity, and crowdsourcing** as strengths while providing **value-added services, resources, and coordination** at a national level.

Nearly half of survey respondents responded to “What makes PKT unique?” with our culture of inclusion, not fitting the mold of typical fraternities, diversity, or our founding history

# Desired Cultural Outcomes of the Strategic Plan

Universal **clarity** and **alignment** on the organization's goals and priorities

Enthusiastic buy-in and **localized understanding** of how each member and chapter **contributes to the bigger picture**

Inspired **re-focus** on a small number of critical areas: **Brotherhood, Value of Membership, and Organizational Growth**

**Outcome-oriented** mindset that aims for greatness with a sense of **urgency** in our pace of execution

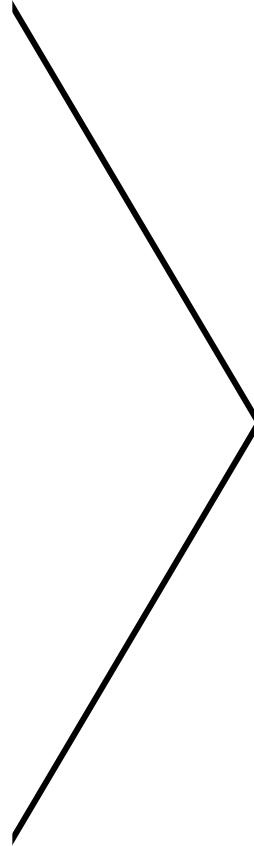
**Confidence** in the national organization's **leadership, transparency, and operational excellence**



# Big Picture Trajectory

## 2021-2025

- Solidify and deliver **differentiated value propositions** that attract and engage undergraduates and alumni
- Shift into a **growth mode**
- **Modernize** strategy, operations, and organizational design to become more agile, innovative, and results oriented



## 2025-2029

- Significantly **increase value per dollar** for national cost of membership
- Begin tracking towards a position as a **Top 10% fraternity**
- Vast majority of undergraduates and alumni **feel connected** and **engaged** with the fraternity
- Take position as a **clear industry leader** for the fraternal movement

# How do we grow?

## a. Secure

- **Sustain** chapters at the campuses we're on
- **Retain** more undergraduates from association through graduation

+

## b. Extend

- **Recruit** more undergraduates
- **Expand** to new campuses

+

## c. Engage

- **Build** more successful chapters
- **Engage** more alumni

*There are parallel – not serial - priorities*

## Summary

# 2021-2025 Phi Kappa Tau Strategic Plan

### 1. Accelerate growth of undergraduate membership

- a) Membership – 5000 undergraduate members by 2025
- b) Campus Footprint – 100 active chapters and associate chapters by 2025
- c) Alignment to Trends- Develop and implement a plan to align Phi Kappa Tau’s strategies and programs to macro trends in the higher education environment

### 2. Provide differentiated value of membership through personal and professional growth and engagement

- a) Experience Quality- Fewer than 20% of chapters score “Needs Improvement” each year on the Borradaille Challenge
- b) Education – 75% of undergraduates participate in an impactful Phi Kappa Tau educational program prior to graduating
- c) Service Learning, Philanthropy, & Leadership- Launch recruitment strategies and other programs that align the Phi Tau experience with student majors and career goals
- d) Risk Management- Less than 5% of chapters per year have a risk management or safety incident

### 3. Facilitate strong, lifelong ties of brotherhood

- a) Membership Development- 100% of chapters implement a (to-be-developed) next-generation membership orientation and development program
- b) Student Success – 75% of undergraduate members are retained from association through graduation and graduate within 6 years of matriculation
- c) Alumni Engagement- Increase the number of engaged alumni by 100%

### 4. Establish a best-in-industry operational and financial model

- a) Organization- Implement improvements to staff/volunteer org design, roles, and processes based on a Comprehensive Organizational Development Review
- b) Execution- Achieve 80%+ of the Strategic Plan targets by 2025 and publish a progress scorecard to the membership each quarter
- c) Housing- Increase total housing equity (across all housing corporations and national entities) by 20%, and increase members housed in fraternity facilities by 20%
- d) Technology- Create and implement a Digital and Technology Strategic Plan

