



## 2021-2025 Strategic Plan Overview

## 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 Borradaile 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



# 1. Accelerate growth of undergraduate membership

- a) Membership – 5000 undergraduate members by 2025 (currently 3700)
- b) Campus Footprint – 100 active chapters and associate chapters by 2025 (currently 83)
- 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 (changing student population makeups, new educational models, DEI, accessibility, first-generation students, etc.)



## 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 Borradaile 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 (examples: how PKT’s partnership with SeriousFun can provide hands on career development experiences to healthcare and education majors; how chapter leadership roles can provide management experience to business majors)
- d) Health & Wellness- 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% (who volunteer, donate, or attend an event/program each year)



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

- a) Organization- Implement improvements to staff/volunteer org design, roles, and processes (EO, NC, National Committees, DD's, BOG's, Deans, etc.) 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

