

Six Steps for Strategic Planning: The Narrative and Lessons of the Phi Delt 2020 Strategic Plan

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In 2011, the General Council and staff of Phi Delta Theta set out to create a strategic plan to provide consistency in operations, prioritization, and resources across board terms and future staffing, all while ensuring the Fraternity's relevance in higher education in the future.

Previously, the Fraternity had looked at its priorities in conjunction with the two-year election cycle of the General Council. The group gathered with the goal of looking beyond the next two years, redefining the Fraternity's mission and vision statements, and conducting a self-assessment, while looking at its external environmental opportunities. Through this process, "Phi Delt 2020" was created, and has served as the Fraternity's "North Star" since its inception to ensure Phi Delta Theta meets the vision of "Phi Delt 2020." The following six steps were used to guide the Phi Delt 2020 strategic planning process, and it can be replicated by others seeking similar success.

Step 1: Decide where you're going

As with any strategic plan, Phi Delt 2020 began with a vision – to be the premiere fraternal leadership organization in North America. In addition to a strategic vision, the board and staff crafted a mission statement: To fulfill the principles of The Bond by providing our members a lifetime association that enhances success, enjoyment, and fulfillment in life.

These combined statements would later provide the inspiration and the "glue" for the entire plan. In the context of Phi Delta Theta, they created a roadmap to what we believe to be greatness.

Step 2: Determine the Mechanics and Structure

An asset of Phi Delt 2020 is its structure and mechanics. The staff and board determined six strategic areas the plan should focus on:

- Growth – Retention, recruitment, expansion, and support for all three
- Education – Conferences, online learning, initiatives, and new member education
- Support – Volunteer recruitment and training, chapter and housing support
- Communications – Branding, communication channels, member and constituent engagement
- Capacity – Infrastructure, staffing, internal operations, and training
- Funding – Fundraising goals and strategies, and alternative revenue generation

In addition, each strategic area included a strategic initiative statement, or sub-vision, and a set of overall goals for each of the six areas. However, that is just the first page of the plan.

The back of the 2020 document includes all of the SMART goals, grouped according to strategic area and goal statement. These action steps include information such as objectives, timetables, and responsible parties. Phi Delt 2020 also includes a numbering system for all goals and objectives. For example:

- Each strategic area is numbered 1-6 (example: 1)
- Each goal statement also receives a number code following the strategic area (example: 1.1)
- Actions steps and SMART statements receive an additional number code (example: 1.1.1)

This number system is utilized in all reports and documents so any constituent will know exactly which SMART statement, goal statement, and strategic area is being referenced. With all the potential goals accompanying a 10-year strategic plan, a numbering system such as this is critical to the user-friendliness of the plan.

Step 3: Create a Culture Around the Plan Implementation

The board and staff review progress, updates, and potential challenges of 2020 at every board meeting (3-4 times per year). The culture we have created around this plan affords us the latitude to add or reprioritize objectives during these board meetings to satisfy the needs and interests of the organization. In the beginning, the staff engaged in strategy sessions to determine solutions, and to discuss where increases in efficiencies might exist through collaborating across goals and departments. These later evolved into “Data Day” retreats where senior staff examine analytics across the organization and determine strategies to more efficiently achieve the outcomes set forth for 2020.

The board and staff also host an in-person strategic planning retreat every September to kick off the new academic year. These retreats provide the opportunity for intense reflection on 2020 progress, review of future opportunities, and analysis of data trends that all impact the organization.

The implementation of Phi Delt 2020 has transformed our staff culture towards increased focus, efficiency, and productivity. Each staff member has a laminated copy of 2020 on their desk. In addition, Phi Delt 2020 goals comprise the majority of all staff performance objectives. The convenience of the plan is such that goals and priorities each year are already set, reducing the amount of time spent working through annual goal opportunities.

2020 has also shifted our culture with regard to distributing resources, ensuring the organization continues to be good stewards of the funding entrusted to us by our membership. At any level, we can determine whether programming and support requests need to become priorities and be added to the plan, or if they do not align, they can be held for future

consideration. In short, every project, initiative, consideration, and proposal is carefully considered in accordance with the plan.

Step 4: Tell Everyone, and Tell Them Often

Another success factor in our experience has been the promotion and communication of the plan. In the beginning, our efforts were focused on education and exposure to the plan to foster support from chapters and other constituents, and to also include them in this dream that is the future of Phi Delta Theta. The plan was posted on all major communication channels – magazine, website, e-communications, conference materials, etc. The board and staff have worked diligently to regularly report 2020 progress through an annual report full of interesting stats and infographics. These annual snapshots, as they are now called, are distributed at every Phi Delt educational conference, donor visit, and general event to showcase progress to our membership.

Step 5: Document the Lessons You Learn Along the Way

As with any major undertaking, Phi Delta Theta has learned a wide array of lessons throughout the journey of our strategic plan, and we are bound to learn more as we enter the last half of the plan's timeline. Three significant lessons learned after the first five years include:

- Master of the art of constant reprioritization. Whether in response to a business need or the higher education landscape, projects and priorities change. The advantage of the plan, however, is despite the need to shift focus, you know you are still making forward progress.
- The more we talk about the plan, the more oversight we have. Even though individuals are responsible for leading the execution of specific goals, the more we talk about the plan as a staff, the more we can connect projects across strategic areas. This creates collaboration and synergy amongst the staff, enabling us to achieve more with less.
- It is okay to change the plan. Just because we created and approved a plan does not mean it cannot be regularly evaluated and updated. As with our staff, we expect the strategic plan to be agile as long as we conduct a needs analysis and provide rationale for adding, editing, or deleting goals. Basically, do not leave your plan on the shelf to collect dust for ten years and then start to look at how much you have achieved.

Step 6: Hone Your Forward-Thinking Skills

An intense focus on forward thinking has been a critical positive effect of our plan implementation. Since we are always evaluating the progress of the plan, we are looking towards the future and enhancing workflows.

As such, we have developed a unique ability to see around corners, and to do a much better job of forecasting where our attention and resources should be directed. All this is to ensure we are

providing an experience that affords our members the opportunity to become the greatest version of themselves.

Now What?

Phi Delta Theta hopes campuses and headquarters alike can benefit from our story and lessons learned. Implementing and operationalizing a plan such as this can drastically reduce downtime and direction-seeking during staff turnover, and it can create measurable success stories for campus leadership and volunteer boards. By including key stakeholders and staff in the plan, you too can create a roadmap for success to take your organization to new heights.