



Launching New Dimensions of *Strategic Planning* A Guide to Developing Your Chapter's Strategic Plan



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Thanks to the members of the 2010-2014 International Strategic Planning Committee. Because we wanted continuity in our planning from the previous administrations, we utilized some of their information in addition to information provided in the 2010-2020 Alpha Kappa Alpha Sorority, Incorporated® Strategic Plan.

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Coming together is a beginning; keeping together is a process; working together is success.

Henry Ford



ALPHA KAPPA ALPHA SORORITY, INCORPORATED®
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What is a Strategic Plan?

A Strategic Plan is a roadmap that allows us to examine our strengths, weaknesses, opportunities, and risks through a structured approach that begins with the mission of our organization. Successful strategic planning is a process, not a one-time event. Strategic planning is creating a strategy for achieving the organization's goals and then devising an organized method to accomplish this strategy. Success will be determined by how well your planning process motivates and inspires change. Strategic planning is effective in clarifying strategic priorities and aligning resources to achieve impacts that strengthen operationally and programmatically. We have a strategic plan for Alpha Kappa Alpha Sorority, Incorporated.[®] Now we want to ensure that you have a strategic plan for your chapter.

Each chapter's strategic plan will be different based upon the fact that every chapter is unique. But there are some common themes that all chapters of Alpha Kappa Alpha Sorority have in common. In developing your chapter's strategic plan, please review Alpha Kappa Alpha Sorority's 2010-2020 Strategic Plan. The format provided in this document is simply a suggested guide to help chapters develop their chapter's road map to successful planning and implementation. The Strategic Plan will include information about where the chapter is today; where the chapter wants to be 3-5 years from now; and specifically what steps will be necessary to get there. Chapters may consider the areas of focus identified in the Alpha Kappa Alpha Sorority, Incorporated's 2010-2020 Strategic Plan. The focus area to help identify chapter goals and objective include:

- Membership
- Structure and Operations
- Finance and Sustainability
- Programs of Service
- Sisterly Relations and Ethical Conduct

Alpha Kappa Alpha's Strategic Planning Process Overview

Alpha Kappa Alpha Sorority, Incorporated[®] initiated a structure for strategic planning for the organization borne of the necessity to support a growing, complex and diverse membership reflective of our Mission and our vision to be the premiere unique sisterhood of distinguished professional women. In Alpha Kappa Alpha Sorority, Incorporated[®] the strategic planning process continues as a disciplined effort to produce fundamental decisions and actions that shape and guide the organization and its membership over the long term. The sorority now encourages chapters to develop strategic plans that establish measureable goals and objectives consistent with and affirms the mission, vision and values of Alpha Kappa Alpha Sorority, Incorporated.[®] This guide is provided as a friendly tool to help chapters in the development of their chapter strategic plan.

Alpha Kappa Alpha Sorority, Incorporated's 2002-2012 Strategic Plan outlined goals based upon 14 guiding principles reflective of the Mission Statement and vision of the organization. The 14 guiding principles are: Sisterhood, Unity, High Ethical Standards, Character, Respect,

Communication, High Scholastic Achievement, Leadership, Education, Health, Family, the Arts, Technology and Economics. These principles became the basis for an action plan that includes goals, strategies and actions for key areas within the sorority including membership, structure and finance.

In 2009, the International Strategic Planning Committee developed a survey and disseminated it to the membership to obtain member perceptions on how well the 2002-2012 Plan was executed. Additionally, the survey allowed members to comment on the sorority's accomplishments, identify opportunities for improvement, and identify the strengths and weaknesses of Alpha Kappa Alpha. The survey solicited information and opinions from sorors, Directorate members and Corporate Office staff on the extent to which the principles had been effective in guiding our organization. Based upon the survey responses, interviews of key leaders of the sorority, and best practices associated with the operation of a complex and dynamic volunteer organization the International Strategic Planning Committee developed the 2010-2020 Strategic Plan for Alpha Kappa Alpha Sorority, Incorporated.[®] The areas of focus for the 2010-2020 plan, approved by the Boule in 2010, included: Membership, Structure and Operations, Finance and Sustainability, Programs of Service and Sisterly Relations and Ethical Conduct.

Why Have a Strategic Plan?

A Strategic Plan will:

- Define objectives for your chapter
- Assess the internal and external environments to formulate clear, realistic, goals and action steps for your chapter
- Represent the views of the major stakeholders of your chapter.
- The diagram below graphically identifies the components of the Strategic Planning Process planning process.



How to develop a Strategic Plan?

Let's Get Started with Chapter Strategic Planning!

STEP 1 Identify your Strategic Planning Team

Identify your chairman and your committee members who will lead your Strategic Planning Process. This leader could be your Standards Chairman or whomever the Basileus appoints.

SUGGESTED CORE TEAM

- ✓ Strategic Planning **Chairman** (Leader)
- ✓ Interested **Sorors** (Diverse Backgrounds)
 - Generational - Ensures all perspectives are at the table
 - Professional – Includes needed expertise and networking potential
 - Sorority/Chapter Experience - Knowledge of Sorority and Chapter culture and help with factoring in the “politics” of the chapter

The Chairman of the Strategic Planning Committee ensures that a broad perspective is presented and ensures the success of the planning process. Therefore, the chairman has to be open to all opinions and recommendations given by the committee and chapter sorors. The chairman receives these opinions and recommendations and discusses them with the committee so the committee can represent the input from the chapter.

STEP 2 Gathering Needed Information

You **MUST** gather information from members of your chapter in order to develop your chapter's strategic plan. Chapters can consider conducting a SWOT and/or PEST Analysis and/or conduct a chapter survey. The SWOT Analysis (Strength, Weakness, Opportunities, and Threats) and/or PEST (Political, Economic, Socio-Cultural and Technological) Analysis will assist you with your internal and external analyses.

Examples of Strategic Planning tools, SWOT and PEST, analysis that assist chapters when conducting the external and internal analysis upon which the plan is developed diagramed below.

Internal Analysis: (Strengths, Weaknesses, Opportunities and Threats) In addition to the SWOT Analysis, chapters can conduct an internal survey, similar to opinionnaire developed on the international level and sent to all chapter members. Chapters will examine major strengths, weaknesses, opportunities, and threats. Attached to this Guide in the Appendix is a sample member survey instrument that Strategic Planning

committees may choose to utilize to obtain chapter member input in the development of the Chapter's strategic plan.



External Analysis: PEST Analysis: How the chapter is impacted by the Political Environment, Economic Environment, Social-Cultural Environment and Technology. What the public/community thinks of the Chapter/Organization based upon what's going on politically, socially, and economically.



STEP 3 Writing the Strategic Plan

When the committee has conducted the chapter survey and/or the SWOT/PEST Analysis and has compiled the data, they are now ready to begin writing their Strategic Plan.

1. Introduction: You should have an introduction to your plan which can include the process by which you developed your strategic plan.

2. Mission Statement: The Mission Statement is a statement of organizational purpose. See Article II – Purpose in the Alpha Kappa Alpha Sorority Constitution.

3. Vision Statement: Vision is what we aspire our chapter to look like. Vision statement is a description of what an organization will look like if it succeeds in implementing its strategies and achieves its full potential. The vision statement should be inspirational. It identifies what we really want the organization/chapter to be. The chapter vision statement should be the same as the sorority's International vision statement. (i.e. Alpha Kappa Alpha Sorority, Incorporated® is the premier unique sisterhood of distinguished professional women united to serve humankind.)

4. Values Statement: What a Chapter envisions for itself. This depicts the priorities of how the Chapter carries out activities with its constituents and stakeholders - internal and external. The value should state the expected behavior; what drives us. Alpha Kappa Alpha's Guiding Principles can be listed as a part of or after the Values Statement.



ALPHA KAPPA ALPHA'S GUIDING PRINCIPLES

- **SISTERHOOD** – *Our behavior will cultivate an atmosphere in which women are encouraged to achieve their highest goals, hopes and dreams.*
- **UNITY** – *Our performance will foster unity and friendship among people of all races, genders, ages, nationalities, religions, and cultural backgrounds.*
- **HIGH ETHICAL STANDARDS** – *Our members and officers will exemplify high ethical standards.*
- **CHARACTER** – *Our activities will strengthen character among members and others.*
- **RESPECT** – *Our organization will encourage mutual respect among all members of the human race.*

- **COMMUNICATION** – Our organization will foster an environment of effective communication.
- **HIGH SCHOLASTIC ACHIEVEMENT** – Our initiatives will promote, support and encourage high scholastic achievement.
- **LEADERSHIP** – Our activities will advance the training and development of leaders.
- **EDUCATION** – Our initiatives will advocate lifelong learning for the people we serve.
- **HEALTH** – Our initiatives will facilitate standards of health to ensure a better quality of life.
- **FAMILY** – Our initiatives will enhance family life.
- **ARTS** – Our initiatives will sustain the arts.
- **TECHNOLOGY** – Our organization will effectively utilize appropriate technologies to continually improve organizational efficiency.
- **ECONOMICS** – Our organization will endorse solid economic practices and economic empowerment.

Based on your External and Internal Analyses, you will begin to identify your strategic Issues and goals for your Plan.

External Analysis: (Political Environment, Economic Environment, Social-Cultural Environment and Technology) What the public thinks of the Chapter/Organization based on what's going on at the international/corporate/regional level - what's going on politically, socially, economically, etc.

Internal Analysis: (Strengths, Weaknesses, Opportunities and Threats) Chapters conduct an internal survey, similar to opinionnaire developed by the International Strategic Planning Committee.. Chapters will examine major strengths, weaknesses, opportunities, and threats regarding it.

5. Identify Strategic Issues: (Items the Chapter Must Address Based on Data/Survey) Chapter identifies major immediate and near-term issues that must be addressed. Issues such as Membership, Finance, and Sisterly Relations are some of the ones that may be critical to the Chapter. These are the things that have to be done to be successful; what will get us from point A to point B.

- Membership
- Programs
- Organization/Structure
- Governance
- Financial Stability and Sustainability

6. Strategic Goals: How the above identified issues will be addressed. The development of goals is a key step in effective strategic planning. Goals can be defined as a written target of where an organization wants to be within a specific timeframe. They state what the organizational plans to accomplish over the next several years. Goals are long term organizational targets that define what the organization is going to do, who is going to do it, and the time frame in which it will be done. Make sure the goals and strategies are closely aligned with your mission and vision. Effective goals have five common characteristics which, when followed, will make achievement more likely and planning more precise. These characteristics are:

- a. The goal must be **specific**. The more specific the goal is, the more likely the chapter is to achieve it.
- b. The goal must be **measurable**. There must be a way to determine whether or not the chapter is making progress toward the goal, and there needs to be a way to clearly define the movement when the goal is achieved.
- c. The goal must be **attainable**. Will the goal lead to the desired outcomes? Does the goal accomplish the mission of the organization or at least contribute meaningfully to the mission?
- d. The goal must be **realistic**. Take into consideration factors such as time and resources when setting goals that makes sense for the uniqueness and needs of the chapter.
- e. The goal must be **time specific**. Tying a goal to a deadline is critical. It allows the objectives which flow from the goal to address both direction and speed. Goal achievement is significantly enhanced when it is linked to a deadline.

Remember the key when setting **chapter goals for the Strategic Plan** is you must ensure that the Goals are **SMART GOALS**:



7. Performance Matrix: Methodology to measure how the chapter is moving towards the goals outlined. (Measure every 3, 6, and 12 months)

8. Follow-up and Data Collection: Data collection can be qualitative (focus groups) and quantitative (surveys). Follow-up is the step that examines whether the organization achieved what it planned. It measures the organization's success in executing action plans prior to starting the process.

9. Evaluation and Re-evaluation: Chapters must determine how the strategic plan will be evaluated to determine the extent to which goals and strategies were achieved. The evaluation should inform the chapter of process made over a period of time. Remember the evaluation occurs throughout the existence of the strategic plan.

10. Strategic Control: Each chapter should have a strategy for tracking how the goals and objectives are being implemented, detecting problems or changes in underlying premises and making necessary adjustments as necessary. There are two questions usually asked during this process 1) are we moving in the proper direction? Are key things falling into place? Are our assumptions about major trends and changes correct? Should the strategy be adjusted or aborted? 2) How are we performing? Are objectives and schedules being met? Are costs, revenues and cash flows matching projections?

Some time will elapse between the initial implementation of a strategy and achievement of its intended results. There are four basic types of strategic control: 1) premise control which checks to make sure the reasons the goal was set are still valid; 2) special alert control – making sure that the chapter monitors its progress in every area 3) strategic

implementation takes place in a series of steps, to check on tactical programs and monitoring strategic thrusts and milestone reviews.

A strategic plan can be evaluated by reviewing:

- a) Budgets
- b) Schedules/timelines
- c) Activities

Chapters should have progress reports periodically example: 3 months, 6 months, or annually for long term strategic goals.

There should be reality checks: Are there barriers that were not identified in the beginning?

STEP 4 How will you communicate the Strategic Plan to Your Chapter?

It will be most important that on-going reporting to the chapter members on the status of goals, objectives and strategies occurs. The on-going updates require that information is made available through reports, brochures, one page descriptions, newsletters, Executive summaries, or fact sheets. How you make available information to the members should take into account the needs of different audiences, i.e. Golden Sorors, millennials, chapter officers. When designing the communication, strategic planning updates, consider the following questions. What does the members need to be provided related to progress, implementation and outcomes? What do members require to influence their support of changes in programs, policies or practices? At the conclusion of the plan, 3 year or 5 year, a final summary should be submitted to the chapter.



**2014 -2016 International Strategic Planning Committee
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APPENDIX



Alpha Kappa Alpha Sorority, Incorporated®

SUGGESTED CHAPTER MEMBERSHIP SURVEY



The _____ Chapter of Alpha Kappa Alpha Sorority, Incorporated® thanks you for your dedication as we launch new dimensions of service. The Strategic Planning Committee requests your input as part of a continuing process to improve our chapter's long-term plans, in regards to its operation and programs. Honest responses to the survey questions will help the committee in its candid assessment of the effectiveness of our chapter's current operations and programs pursuant to our international and local mission statement. The responses will also assist in identifying the challenges that must be addressed by both our leadership and members over the next 5-10 years.

Please provide a candid response to each of the questions in the survey based on your personal knowledge and experiences. Your response will be invaluable to the Strategic Planning Committee as it prepares of our Chapter's Strategic Plan. Your survey should be completed no later than _____.

1. How long have you been a member of Alpha Kappa Alpha?

- ☐ <5 years ☐ 5-9 years ☐ 10-14 years ☐ 15-19 years
☐ 20-24 years ☐ Silver Soror (25-49 yrs) ☐ Golden Soror (50-74 yrs) ☐ Diamond Soror (75 yrs or more)

2. Which category best describes your financial status?

- ☐ Financial less than 5 years ☐ Financial 5-15 years ☐ Financial 16-24 years ☐ Financial 25 years or more

3. How long have you been a member of our chapter?

- ☐ <5 years ☐ 5-9 years ☐ 10-14 years ☐ 15-19 years
☐ 20-24 years ☐ Silver Soror (25-49 yrs) ☐ Golden Soror (50-74 yrs) ☐ Diamond Soror (75 yrs or more)

4. Do you currently hold an office in our chapter? ☐ Yes ☐ No

5. Have you held an office in our chapter? ☐ Yes ☐ No

6. Are you familiar with the guiding principles that formed the basis of our International Strategic Plan?

- ☐ Yes ☐ No

7. Which of the following guiding principles have been most successfully addressed by our chapter

(select up to three)

- | | | | |
|---|--|--|--|
| <input type="checkbox"/> Sisterhood | <input type="checkbox"/> Unity | <input type="checkbox"/> High Ethical Standards | <input type="checkbox"/> Character |
| <input type="checkbox"/> Respect | <input type="checkbox"/> Communication | <input type="checkbox"/> High Scholastic Achievement | <input type="checkbox"/> Leadership |
| <input type="checkbox"/> Education | <input type="checkbox"/> Health | <input type="checkbox"/> Family | <input type="checkbox"/> Arts |
| <input type="checkbox"/> Technology | <input type="checkbox"/> Economics | <input type="checkbox"/> All of the Above | <input type="checkbox"/> None of the Above |
| <input type="checkbox"/> Other (please specify) _____ | | | |

Alpha Kappa Alpha Sorority, Incorporated®

Suggested Chapter Membership Survey Questions

8. Which of the following guiding principles have been less successfully addressed to date?

(Select up to 3)

- | | | | |
|-------------------------------------|--|--|--|
| <input type="checkbox"/> Sisterhood | <input type="checkbox"/> Unity | <input type="checkbox"/> High Ethical Standards | <input type="checkbox"/> Character |
| <input type="checkbox"/> Respect | <input type="checkbox"/> Communication | <input type="checkbox"/> High Scholastic Achievement | <input type="checkbox"/> Leadership |
| <input type="checkbox"/> Education | <input type="checkbox"/> Health | <input type="checkbox"/> Family | <input type="checkbox"/> Arts |
| <input type="checkbox"/> Technology | <input type="checkbox"/> Economics | <input type="checkbox"/> All of the Above | <input type="checkbox"/> None of the Above |

Other (please specify) _____

9. _____(Chapter Name) of Alpha Kappa Alpha seeks to maintain a strong, diverse actively involved membership of distinguished women. How successful has our chapter been in meeting this goal overall?

- | | | | |
|--|--|---|--|
| <input type="checkbox"/> Unsuccessful | <input type="checkbox"/> Somewhat Unsuccessful | <input type="checkbox"/> Neither Successful
nor Unsuccessful | <input type="checkbox"/> Somewhat successful |
| <input type="checkbox"/> Very Successful | | | |

10. Chapters are encouraged to reactivate inactive members. How successful has our chapter been in reactivating sorors?

- | | | | |
|--|--|---|--|
| <input type="checkbox"/> Unsuccessful | <input type="checkbox"/> Somewhat Unsuccessful | <input type="checkbox"/> Neither Successful
nor Unsuccessful | <input type="checkbox"/> Somewhat successful |
| <input type="checkbox"/> Very Successful | | | |

11. . How successful has our chapter been in retaining members?

- | | | | |
|--|--|---|--|
| <input type="checkbox"/> Unsuccessful | <input type="checkbox"/> Somewhat Unsuccessful | <input type="checkbox"/> Neither Successful
nor Unsuccessful | <input type="checkbox"/> Somewhat successful |
| <input type="checkbox"/> Very Successful | | | |

12. . Has the Membership Intake Process been effectively implemented in our chapter?

- ☐ Yes ☐ No ☐ Not sure

13. Are the responsibilities of the chapter MIP Committees and the members and the timetables clearly outlined?

- ☐ Yes ☐ No ☐ Not sure

14. MIP and mentoring program have been developed by the International Membership Committee to provide information and guidance on reducing or bridging the growing 'generation gap' in the membership. Do you feel that a generation gap exists in our chapter? ☐ Yes ☐ No ☐ Not sure

14a. If yes, has our chapter found effective ways in helping to bridge the generation gap? ☐ Yes ☐ No

☐ Not sure

Alpha Kappa Alpha Sorority, Incorporated®

Suggested Chapter Membership Survey Questions

15. Were the efforts at bridging the gap successful? ☐ Yes ☐ No ☐ Not sure

(CAN ADD QUESTIONS REGARDING RELATIONSHIP WITH YOUR SPONSORING UNDERGRADUATE CHAPTER.)

16. The _____ (Chapter name) of Alpha Kappa Alpha Sorority, Inc.® seeks to assist in preparing members to become effective leaders. Has the chapter provided opportunities for leadership coaching/training for members and officers? ☐ Yes ☐ No ☐ Not sure

17. The _____ Chapter Name of Alpha Kappa Alpha Sorority, Inc.® has undertaken an initiative to encourage ethical behavior. ☐ Yes ☐ No ☐ Not sure

18. Are you familiar with the Soror Code of Ethics? ☐ Yes ☐ No ☐ Not sure

19. Was the Soror Code of Ethics discussed at a Chapter meeting? ☐ Yes ☐ No ☐ Not sure

20. . Has the Soror Code of Ethics made a difference in members' conduct? ☐ Yes ☐ No ☐ Not sure

21. Are the members of our chapter in compliance with the Soror Code of Ethics? ☐ Yes ☐ No ☐ Not sure

22. The _____ (Chapter name) of Alpha Kappa Alpha has undertaken initiatives that encourage collaborative working relationships among members. Has the Sisterly Relations Activities been helpful in achieving this goal? ☐ Yes ☐ No ☐ Not sure

23. . Has our chapter employed sufficiently varied techniques to achieve this goal? ☐ Yes ☐ No ☐ Not sure

24. Our chapter believes that the utilization of up-to-date technologies is necessary to ensure effective and efficient communication among our members. Has the chapter's website been effective in improving communication within the membership? ☐ Yes ☐ No ☐ Not sure

25. Is the website easy to navigate? ☐ Yes ☐ No ☐ Not sure

26. . Has the mechanism utilized for disseminating chapter information (meeting notices, minutes, committee reports, agendas, etc.) been successful? ☐ Yes ☐ No ☐ Not sure

PROGRAMS OF SERVICE

27. Are the chapter's current program initiatives responsive to our community's needs? ☐ Yes ☐ No
☐ Not sure

28. Is our chapter effective in implementing the current International Programs? ☐ Yes ☐ No
☐ Not sure

29. Is our chapter effective in evaluating the impact of our programs in the community? ☐ Yes ☐ No
☐ Not sure

Alpha Kappa Alpha Sorority, Incorporated®

Suggested Chapter Membership Survey Questions

FINANCE

30. The _____ (Chapter Name) of Alpha Kappa Alpha seeks to maintain a strong financial base.

☐ Yes ☐ No ☐ Not sure

31. . Does our chapter follow the fiscal fitness procedures as outlined in our Alpha Kappa Alpha documents?

☐ Yes ☐ No ☐ Not sure

32. . How successful has our chapter been in our fundraising activities? ☐ Yes ☐ No ☐ Not sure

33. . Have our chapters' efforts to pursue corporate and /or government funding been successful?

☐ Yes ☐ No ☐ Not sure

(NEED QUESTIONS REGARDING THE FOLLOWING IF IT RELATES TO YOUR CHAPTER)

- Questions regarding your Foundation; the relationship of the chapter officers and Foundations Board of Directors
- Questions regarding your Chapter House
- **Specific Question Regarding Chapter's Strategic Plan...**
- **Please list three goals or priorities that you believe the chapter's Strategic Plan should address.**

SWOT Analysis Worksheet

- For instructions on using SWOT Analysis, visit www.mindtools.com/rs/SWOT.
- For personal career or life strategy, visit www.mindtools.com/rs/LifePlanWorkbook.

<p>Strengths What do you do well? What unique resources can you draw on? What do others see as your strengths?</p>	<p>Weaknesses What could you improve? Where do you have fewer resources than others? What are others likely to see as weaknesses?</p>
<p>Opportunities What opportunities are open to you? What trends could you take advantage of? How can you turn your strengths into opportunities?</p>	<p>Threats What threats could harm you? What is your competition doing? What threats do your weaknesses expose you to?</p>

[illegible]



[Chapter Name]
2016-2018 Strategic Plan

INTRODUCTION

The purpose of the strategic plan is to define the results [CHAPTER NAME] seeks to accomplish, in alignment with Alpha Kappa Alpha's **Mission** and in fulfillment of its **Vision**. The sorority's mission and vision drive the goals, objectives, and activities of Chapter planning. The Plan answers a fundamental question —where do we want to be and what are we doing to get there?

The Plan shall serve as our Chapter's primary action planning guide, focused on long-term goals, objectives and action plans. Goals defined are specific, measurable and time-defined, and they emphasize results, not process. The 2016-2018 Strategic Plan (Plan) represents the "voice" of the Chapter for desired outcomes it would like to achieve over the next three (3) years.

MISSION STATEMENT (Article II – Purpose)

The purpose of Alpha Kappa Alpha Sorority is to cultivate and encourage high scholastic and ethical standards, to promote unity and friendship among college women, to study and help alleviate problems concerning girls and women in order to improve their social stature, to maintain a progressive interest in college life, and to be of service to all mankind.

VISION STATEMENT (taken from the current International Strategic Plan)

Alpha Kappa Alpha Sorority, Incorporated is the premier unique sisterhood of distinguished professional women united to serve humankind.

VALUES STATEMENT

Of the sorority's guiding principles, members found the following principles to be the "Top 5" for the Chapter (listed in rank order):

1. Guiding Principle 1
2. Guiding Principle 2
3. Guiding Principle 3
4. Guiding Principle 4
5. Guiding Principle 5

In summary, the [Chapter Name] values our [paraphrase your top principles].

Example: In summary, The Best Chapter prides itself on being a sisterhood of service and the impact we make in our local communities. We have developed key partnerships to enhance the lives of families, and continue efforts to ensure we remain unified and supportive of each other in all that we do.

ANALYSIS AND KEY FINDINGS

The Committee took several steps to collect input from the membership as part of an environmental scan to examine both external and internal factors that would affect the progress and direction of the Chapter. These include strengths, weaknesses, opportunities and threats. The results for each analysis are listed below.

Instrument	Timeline	Results	Key Findings
SWOT Analysis	[date(s) conducted]	<u>Strengths:</u> <ul style="list-style-type: none">• [limit to 3] <u>Weaknesses:</u> <ul style="list-style-type: none">• [limit to 3] <u>Opportunities:</u> <ul style="list-style-type: none">• [limit to 3] <u>Threats:</u> <ul style="list-style-type: none">• [limit to 3] 	
PEST Analysis	[date(s) conducted]	<u>Political:</u> <ul style="list-style-type: none">• [limit to 2] <u>Economic:</u> <ul style="list-style-type: none">• [limit to 2] <u>Socio-Cultural:</u> <ul style="list-style-type: none">• [limit to 2] <u>Technological:</u> <ul style="list-style-type: none">• [limit to 2] 	

ANALYSIS AND KEY FINDINGS, continued

Instrument	Timeline	Results	Key Findings
Chapter Survey (sample provided)	[date(s) conducted]	Enter chapter survey results here. Chapter survey may include questions about: <ul style="list-style-type: none"> • Membership activities • Operations • Communications • Program effectiveness • Top priorities for chapter • What worked well? • What didn't work well 	
Focus Group	[date(s) conducted]	Enter summarized information from focus group conducted. Participants should include about 5% of the Chapter's membership base, with diverse representation, such as: Golden Soror(s) Membership Committee Chairman Former Chapter Baslei New Chapter member(s) Regional/International	

With the combined instruments used for analysis, common themes emerged from the overall 'Key Findings' are included in the **Strategic Goals** section of the Plan.

STRATEGIC GOALS

Also, known as strategic priorities, the Chapter identified major immediate and near-term issues to be addressed based on the above-referenced 'Key Findings.' As a result, a total of [choose 3, but no more than 4] common themes, or key focus areas were identified as the foremost goals for the Chapter:

- Goal 1
- Goal 2
- Goal 3
- Goal 4

Note: Focus areas could include values or themes such as Sisterhood, Program Execution, Foundation, Finance, Community Partnerships, Fundraising, etc.

Chapter Name] 2016-2018 Strategic Plan

OBJECTIVES

The Chapter identified several key objectives and action items as part of its strategy to reach its goals.

Goal 1: Financial Improvement (example)

Objective	Key Actions	Timeline	Responsibility
1. 60% of budget for program to qualify for no sales tax		2016	Anti-Basileus Finance Committee Foundation Board
2. 25% of budget spent on operations and 75% on programming		2017	Anti-Basileus Program Committee Finance Committee
3. Implement fund development plan		2017	Foundation Board Finance Committee
4. Implement new Investment strategy		2018	Tamiouchos Finance Committee

Goal 2: [list goal here]

Objective	Key Actions	Timeline	Responsibility

Goal 3: [list goal here]

Objective	Key Actions	Timeline	Responsibility

Goal 4: [list goal here]

Objective	Key Actions	Timeline	Responsibility

IMPLEMENTATION AND MAINTENANCE OF PLAN

The Strategic Planning Committee will have oversight of the Plan, with the Standards Committee serving as evaluators to determine the Plan's effectiveness.

Process Steps for Completion

With the Chapter's full participation throughout the process, the Strategic Planning Committee has defined the following steps to complete the Plan:

[List steps taken toward completion of plan – bullet if possible.]

- Basileus appoints Chairman (SP Lead) for Strategic Planning process
- SP Lead and Basileus discuss annual approach, including analysis tools and schedule of strategic planning events (in order):
 - Educational session
 - Chapter input sessions (to include SWOT/PEST analysis, survey, or other tools)
 - Leadership work session
 - Chapter reporting
- Conduct pre-defined activities
- Conduct Plan evaluation (Standards Committee)
- Update Plan on annual basis, informing Chapter of changes

Maintenance of Plan

[Provide a summary on how you plan to maintain, or update your plan.]

- Check-in with assigned owners of key initiatives, or activities
- Review and track progress on a quarterly basis
- Report updates on a semi-annual, or annual basis at minimum
- Redefine Plan components as needed, with Chapter buy-in, or approval as determined
- Keep current version of Plan posted on Chapter site for review
- Submit updated Plan on annual basis Regional Director as required
- Maintain updated Plan in Chapter files for Chapter self-assessment and evaluation purposes

CONCLUSION

The 2016-2018 Strategic Planning Committee would like to thank the Chapter and Leadership Team for its full participation to successfully implement this Plan.

Strategic Planning Committee Members

[List committee members]

Chapter Approval

Per Chapter records, this Plan was approved by the General Body on [insert date here].

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