

THE NEXT FIVE YEARS

2022-2026

THE ALPHA CHI RHO EDUCATIONAL FOUNDATION'S LONG-RANGE PLAN

ADOPTED BY THE BOARD OF TRUSTEES ON DECEMBER 11, 2021

UPDATED: 3/12/2022, 6/1/2022



“ACTIONS SPEAK LOUDLY”

ALPHA CHI RHO EDUCATIONAL FOUNDATION, INC.

R.B. STEWART NATIONAL HEADQUARTERS

109 OXFORD WAY

NEPTUNE, NEW JERSEY 07753

EXECUTIVE SUMMARY

The Next Five Years, 2022-2026 is the Alpha Chi Rho Educational Foundation's long-range plan to implement the Mission Statement it adopted in 2019 while maintaining the programs and services it now offers to the Brothers of Alpha Chi Rho, the National Fraternity, and other parties.

The plan contemplates actions in five areas:

- Promoting Academic Excellence and Leadership
- Educational Sponsorships
- Communication
- Infrastructure Resources
- Finances

Across them, it sets goals to which the Foundation aspires to progress with 20 specific objectives and strategies the Foundation intends to achieve over the plan's five-year period.

In the area of Promoting Academic Excellence and Leadership, the objectives include creation of an Educational Ambassador program to assist the Fraternity's Chapters to develop their members' academic growth, work with the Fraternity to create a career network and platform of skills-based training resources, and support ways in which recent Graduate Brothers can serve as good role models for undergraduate Brothers.

In the area of Educational Sponsorships, the objectives include both developing new educational sponsorships to meet identified needs and growing the Foundation's assets to increase the financial support for them. The Foundation also will provide input on the educational programs of the National Fraternity that it supports and regularly evaluate their effectiveness.

To enhance its Communication with undergraduate and Graduate Brothers and other interested parties, it will develop new communication vehicles and adopt new communication platforms to meet the needs of individual Brothers, the Fraternity's Chapters, and other parties.

In the area of Infrastructure Resources, over the five-year period the Foundation will both increase its full-time staff to support its new initiatives and expand its pool of Brothers and other volunteers to support the staff. The Foundation plans to assess and improve its productivity and to increase participation of volunteers.

Finally, in the area of Finances, the Foundation will seek to grow its assets from \$3.5 million today to \$5 million by 2026 while operating in a fiscally responsible manner.

The plan's appendix includes detailed tactical plans to use in achieving the objectives.

INTRODUCTION

In December 2020, the Alpha Chi Rho Educational Foundation adopted a new mission statement (below). Soon, it became clear that the Foundation needed a multi-year plan to guide it in implementing the mission. This plan is intended to do so. It is based on analyses of information from the Graduate Brothers who took part in the 2019 Cygnus survey of graduate members of Greek organization and from a focus group of Resident Brothers at the National Fraternity's 2021 Convention; historic data derived from the Foundation's annual Form 990 submitted to the Internal Revenue Service, as compiled by Pennington & Co.; and the vision of members of the Board of Trustees for the Foundation's future.

The Foundation intends to carry out this plan. However, since the future is unknown, changing needs and circumstances may require refinements in the plan from time-to-time. Evaluation of the success of actions to carry out the plan will be made at least annually and considered at meetings of the Board of Trustees.

MISSION

The Alpha Chi Rho Educational Foundation cultivates academic excellence and leadership development through financial assistance and program support for the educational pursuits and initiatives of the Brothers, Chapters, the National Council of the Fraternity of Alpha Chi Rho, and other students. The Foundation fosters lifetime commitment to personal enrichment and community service by members of Alpha Chi Rho as Men of Word and Deed.

OBJECTIVES AND HOW TO GET THERE

To carry out its mission during the next five years, the Foundation will continue its existing programs and services; in addition, it will focus efforts in the following areas:

- Promoting Academic Excellence and Leadership
- Educational Sponsorships
- Communication
- Infrastructure Resources
- Finances

In these five areas, the plan sets six goals, to which it aspires to progress, and 20 objectives that it intends to achieve over the five-year period. They are based on common themes seen in the wealth of information gathered. These goals and objectives are set forth below, together with succinct rationales and promising strategies. An appendix to the document sets forth the tactical plans the Foundation staff, officers, and committees, and the National Fraternity, expect to follow in achieving the objectives.

Promoting Academic Excellence and Leadership

GOAL A: To promote academic excellence through improved communication among AXPEF, Resident Chapters, and their members regarding programs and opportunities available, and to promote and encourage personal development of both Resident Brothers and Graduate Brothers as Men of Word and Deed who are leaders on their campuses, in their communities and countries, and in the world.

Rationale: We are an educational foundation. Supporting the education of Brothers in Alpha Chi Rho is our primary purpose. We do this both for Resident Brothers and for Graduate Brothers. Over the past two years, both Resident and Graduate Brothers have told us their needs for this support. We must work to meet those needs.

At the 2021 National Convention, our undergraduates said the three most important things the Foundation does are (1) providing scholarships and loans (discussed later in this Plan), (2) offering grants for such varying educational purposes as developing Chapter libraries and paying the initiation fees to honor societies, and (3) supporting leadership development programs.

In the 2020 Cygnus survey of Graduate Brothers, from 32 to 36 percent of our donors said they would aid the support of individual excellence among the Brotherhood. Nearly half of major donors said they give to “support the impact members have on society.”

In their statements of their visions for the Foundation, a significant number of Trustees called for expanded services to the Brotherhood, such as “expansion of Educational Use Grants by Chapters; comprehensive diversity, equity, and inclusion training; educational programming at Convention and Conclave; reinstatement of the in-person InDeed Institute, starting in 2022; annual sponsorship of several Brothers to participate in the Northeast Greek Leadership Association annual conference as well as other undergraduate leadership development programs.” “By the end of the strategic plan, the Foundation will sponsor at least three virtual education programs per semester for Chapter members, based on their elected position (e.g., Postulant Educator, Treasurer, Risk Management Officer, Recruitment Chair).”

Objectives & Actions

To address this goal, over the next five years we will seek to accomplish the following objectives:

Objective 1. Academic Excellence. The Foundation will create an Educational Ambassador program in which each Trustee will assist two or more Chapters in developing the academic growth of its Resident Brothers. It is recommended that at least once an academic term, the Trustee be in direct personal communication with Chapter Scholarship Officers and advisors to inform them of Foundation programs and services, and to report educational ideas, issues, and concerns about such programs and services that Resident Brothers have identified. This program will be operational by September 30, 2022. [updated 6/1/2022]

Owner: Events & Outreach Committee [updated 3/12/2022]

Budgetary Impact: No funding required.

Strategies:

Beginning in 2023, the Foundation will evaluate the program's success at least annually.

Objective 2. Resident Brother Career/Skills Development Program. Explore, in cooperation with the Fraternity, the possibility of creating, by the fall of 2023, a career network and platform of skills-based training resources. The focus will be on career development and include successful strategies and skill sets to realize professional growth. This effort may complement and expand the Fraternity Crow Coach program and include key Chapter operational resources.

Owner: National Fraternity with support from Events & Outreach Committee

Budgetary Impact: \$18,000, as follows:

- a. \$5,500 annually to E-Concepts, Inc. (hosts CultivatingU)
- b. \$3,000 for Career Fair
- c. \$3,000 for Crow Coach / Advisor Training
- d. \$1,500 for postage for Graduate Brother outreach
- e. \$5,000 for a platform such as Graduway (a virtual community and enablement platform "to recruit and mentor students, engage alumni and volunteers, and cultivate donors at scale")

Strategies:

The program will create a network of Graduate Brothers as resources to share "real-time" career experience and education for successful development of life and leadership skill sets. We will encourage role-modeling and develop a support system that will encourage Brothers to succeed in their chosen path. In 2023, the program will be showcased and rolled out at Convention. Program activities will build upon campus resources available.

Objective 3. Newly Graduated Brother Education. During 2022 and 2023, the Foundation will develop a process or module for senior Resident Brothers and recent Graduate Brothers to serve as good role models for undergraduate Resident Brothers. The program will be rolled out in relation to Convention in 2023. Beginning in 2024, the Foundation will evaluate its success at least annually.

Owners: National Fraternity and Events & Outreach Committee

Budgetary Impact: \$3,000, as follows:

- a. \$2,000 for new program/modules (on E-Concepts' website)
- b. \$1,000 for postage for alumni outreach

Strategies:

1. Assess current practices of the Fraternity for facilitating the transition from Resident to Graduate Brother status.
2. Determine both Fraternity and Foundation responsibilities of Graduate Brothers.
3. Determine both Fraternity and Foundation opportunities for Graduate Brothers.
4. Develop an online program identifying and promoting both responsibilities and opportunities.

Educational Sponsorships

GOAL B: The Foundation will support, develop, and maintain quality educational resources for Brothers.

Rationale: The Foundation mission statement includes support for leadership development through support of educational programs for Brothers. The Fraternity uses Foundation resources to enact signature leadership experiences at the InDeed Institute, Convention, and Conclave. As the Foundation provides considerable financial support to these programs and has identified them as an important resource to Brothers, we want to ensure they remain strong and relevant programs in fulfilling our mission.

Objectives and Actions

*Objective 4. **Foundation-Funded National Fraternity Educational Programs.*** Annually, the Foundation will provide input on content for any Fraternity educational programs that receive funding from the Foundation.

Owners: Executive Committee and Programs & Services Committee

Budgetary Impact: No direct impact.

Strategies:

- A. Review content for the InDeed Institute
- B. Review content for Convention programming
- C. Review content for Conclave programming

*Objective 5. **Evaluation of Educational Programs.*** By December 31, 2022, the Foundation will establish a multi-year schedule to evaluate its educational programs, using the feedback to provide a recommendation for future funding allocations.

Owner: Programs & Services Committee

Budgetary Impact: To be determined.

Strategies:

- A. Evaluate the InDeed Institute and recommend future funding allocations
- B. Evaluate Convention educational programming (starting in 2023) and recommend future funding allocations
- C. Evaluate Conclave educational programming (starting in 2022) and recommend future funding allocations

*Objective 6. **Supporting Resident Brothers' Educational Needs.*** Annually, the Foundation Board of Trustees will meet with the National Council of the Fraternity to discuss educational

needs of undergraduates and determine a joint plan for supporting those educational initiatives.

Owners: National Fraternity and Programs & Services Committee

Budgetary Impact: No direct impact.

Strategies:

A. Coordinate meeting schedule and agenda with the Fraternity staff.

GOAL C: The Foundation will promote and expand financial resources for the benefit of its members and others to enable them to meet their leadership and educational goals.

Rationale: The Foundation's stakeholders identify leadership skills, scholarships, loans, and grants as among the most important resources it provides. At the same time, the rising cost of higher education and increased financial need of the Resident Brothers make these resources among the most relevant support we can provide. This goal addresses two problems: (1) Brothers' lack of knowledge of all financial support available through the Foundation, and (2) insufficient resources to meet the total need of our Brothers.

Objectives and Actions

*Objective 7. **New Educational Sponsorship.*** Develop at least one new sponsorship to support educational programs for which the Foundation and the Fraternity currently have no funding and also new programs identified by the Foundation Board.

Owners: Development Committee and Events & Outreach Committee

Budgetary Impact:

- a. No direct impact.
- b. Indirect expenses: The Foundation must consider the funds being allocated for educational programs. In most cases, these are built into the current budget requests. The Foundation must also consider the time commitment for Board members and volunteers to participate in the committee and how devoting time to this project might impact other opportunities and commitments.

Strategies:

- A. Identify criteria for how Educational Sponsorships can be used to share with new donors or sponsors.
- B. Raise funds for the principal of at least one new endowed sponsorship

*Objective 8. **Funding for Educational Sponsorships.*** Grow the endowment for Educational Sponsorships (including scholarships, grants, and loans) to increase the amount of money that can be provided for each.

Owner: Development Committee and Website Committee

Budgetary Impact: To be determined. However, the cost to establish a new scholarship is at least \$25,000.

Strategies:

- A. Consider the effects of adding other scholarships and grants to our current list and how they may be added without affecting our budget shortfall.

Communication

GOAL D: To enhance existing platforms and create and expand use of new media to engage donors, Brothers, and other constituencies. Doing so will allow the Foundation to share information and expand interest in its work. The desired outcomes will be a greater pool of volunteer resources, improved donor engagement, endowment growth, timely communication, and cultivation of future leaders.

Rationale: Non-profits are increasingly challenged by competing organizations for support. We also have a diverse network of Brothers who are geographically scattered. For these reasons, it is imperative that we “stay in touch” to share our mission and achievements as well as to acknowledge and recognize contributions from Brothers, donors, and other persons of interest. Board vision statements indicate that differentiated donor communication is desirable. Recent surveys and feedback from Brothers indicate a desire for more outreach and communication about what the Foundation does. In the 2020 Cygnus survey, 26 percent of donors indicated that there was too little communication from the Foundation, the National Fraternity, or their Chapter. The Promoting Academic Excellence and Finances areas address other forms of communication.

Objectives:

*Objective 9. **Donor Communication & Recognition.*** By end of the first quarter of 2022, the Foundation Board will inventory and assess current donor communication platforms, including database and tools (written and multi-media) for review by Trustees. As necessary, it will develop new personal communication vehicles, including those that target major donors. In 2023, it will define and differentiate communication needs for various donor tiers and for persons in different stages of the lifecycle since materials directed to retirees, for example, are inappropriate for recent graduates. This will increase donor communication and recognition of higher donor levels.

Owner: Development Committee

Budget Impact: \$1,000.

*Objective 10. **Board Media Communication & Use.*** The Foundation Board will review Foundation-related material posted on digital media and develop instructional tools to train Trustees and staff in their use. It will develop new communication platforms and tools as they become available.

Owner: Governance Committee

Budget Impact: To be determined

*Objective 11. **Scholarship Recognition.*** As part of the Convention agenda beginning in 2023, the Foundation will host a small reception for new and previous scholarship winners and publicly post their names for all attendees to access. This endeavor will stimulate commitment among younger Brothers, encouraging them to volunteer for leadership positions and to support the Foundation financially in the future.

Owner: Events & Outreach Committee

Budget Impact: To be determined

*Objective 12. **Chapter Outreach.*** The Foundation Board will enhance Chapter outreach in at least two ways: First, by the end of the first quarter of 2022, it will develop a script outline of key points for Trustees and staff to use when communicating with Chapters and Resident Brothers that will include an overview of online materials regarding scholarships, grants, and loans.

Second, The Foundation Board will periodically submit pertinent information about programs and services to the Fraternity for publication in venues such as “From the Crow’s Nest.” The objective is to provide consistent and accurate communication aligned with what the Fraternity disseminates.

Owner: Executive Committee

Budget Impact: No direct impact

INFRASTRUCTURE RESOURCES

GOAL E: By 2026, create a productive work environment with people, processes, systems, and setting capable of supporting a \$5 million endowment and minimizing duplication of resources between the Foundation and the Fraternity.

Rationale: The Foundation has always operated as a very lean organization. However, the actions this plan proposes, together with the proposed growth in assets, cannot be accomplished by continuing to over-rely on volunteers. To achieve those objectives, the Foundation must align, evaluate, enhance, and expand its people processes and systems, including physical settings. The Board vision statement supported growth in staffing from one to three in the short-term and to five people by the end of year five. At the same time, we must continue to cultivate Brothers and others as volunteers; their work will continue to be essential to our efforts. Our strategy includes a detailed review over the next two years, with full implementation by 2026.

Objectives and Actions

*Objective 13. **Staffing.*** Make a regular full-time appointment of a Director of Development by year-end 2021. Identify and hire an Education/Marketing Manager by the end of the first quarter of 2023. Review and reorganize Standing Committees in 2022 to accommodate changing priorities and to balance the workload among committees.

Committee Owner: Executive Committee

Budget Impact: Candidate travel or job posting expense. Estimated cost: \$500.00

Strategies: Use short-term employment option for Director of Development to handle key financial priorities and to assess fit for both parties' needs.

During 2022, assess staff and committees needed to achieve the plan's objectives and continue existing programs. Change committee structure and responsibilities as appropriate.

Rationale: The existing committee structure has not changed in many years. The responsibilities of individual committees have become imbalanced. This is an opportunity to improve processes and productivity.

*Objective 14. **Volunteer Pool.*** By 2026, using student interns (unpaid) and retirees for specific project needs, expand the Foundation's volunteer pool as resources to staff. On an annual basis, host combined volunteer recognition events for national and local level volunteers (for example, the contributions of Building Corporation and other Graduate Chapter officers who exemplify the principles of Alpha Chi Rho).

Rationale:

By expanding outreach efforts, we access broader volunteer resources, lessen the workload of full-time staff, and create pipelines for future consideration of volunteers as Trustees or in other

positions. We must consider ways to cross-access and use our combined volunteer pool between the Foundation and the Fraternity.

Owner: Events and Outreach Committee in collaboration with the National Council of the Fraternity

Budget Impact: \$300 for the recognition event

Objective 15. Processes: By mid-year 2022, key processes will be evaluated to streamline office operations and improve productivity. The current project management system may be used as a resource guide providing that maintenance is manageable and not replicated.

Rationale:

A complete evaluation of key processes may eliminate redundant processes and result in improved response time, enhanced donor communication, Chapter communication, and Board reporting. Processes should be reviewed and changed as needed to accommodate staff additions.

Owner: Development Committee

Budget Impact: To be determined

Objective 16. Board Self-Assessment. By the third quarter of 2022, prepare a self improvement plan to increase participation and productivity.

Rationale: The Board of Trustees' last comprehensive self-assessment was completed more than five years ago. With the rollout of this plan, new staff in key positions, and the growth of digital media platforms, periodic reviews are helpful to assess goal attainment.

Strategies:

Various feedback methods may be used, including for example, the "McKinsey & Company Nonprofit Board Self-Assessment Tool," which is intended to assist boards in self-assessment and setting priorities.

Owner: Governance Committee.

Budget Impact:

- A. Direct expenses: Paid staff to create report and analyze trends (estimate: 20 hours)
- B. Indirect expenses: Time for the Governance Committee to manage the process and for all Trustees to complete the self-assessment tool

Objective 17. Donor Management. By the second quarter of 2022, review, source, and test alternative wealth screening tools and systems (other than the one now used) that are easily managed and linked to various digital communication platforms. Criteria should include the ability to provide accurate donor profiles, identify and track communications, and respond in a timely manner to donations submitted. Minimum selection criteria are cost, ease of use, and ease of reporting. During 2023, upgrade current systems as needed.

Rationale: Donor acknowledgement with timely responses is a means to maintain donor allegiance.

Owner: Development Committee

Budget Impact: \$1,000 per month, estimated. Consider current monthly expense as an offset.

Strategies:

Design systems that support and recognize major motivators for donors as identified in the 2020 Cygnus survey. Reasons cited are gratitude towards the Fraternity, support of undergraduates and Chapters, and setting an example.

Objective 18. Office Setting/Location. By the end of the first quarter of 2022, decide whether to sell or hold and repair the R.B. Stewart National Headquarters building at 109 Oxford Way, Neptune, New Jersey, based on considerations including a professional inspection report, the impact of relocation on staff, and New Jersey notice requirements for lease termination.

If the Foundation decides to sell the property and relocate, the decision should be made by the end of 2023 if sale is practical and meets legal requirements. Criteria for a new headquarters are accessibility for staff, affordability, space that can accommodate changing work methods and to support five-year growth plan and beyond.

Rationale: The Neptune facility is a large asset that we have occupied since 1983 with much success. However continued maintenance strains financial resources despite the tenancy of the National Fraternity.

Owner: Headquarters Committee

Budget Impact: Fix the roof immediately, using \$100,000 that is part of the money borrowed for the Syracuse Chapter house. Identify alternative funding options.

Strategies:

Seek outside funding options to cover critical maintenance costs and identify alternative options for headquarters location. The intent is to capitalize on the current housing market, and reduce or eliminate major maintenance expense, while preserving memories and the history of Alpha Chi Rho. Repairs are capital expenses, not operational ones.

Finances

GOAL F: Increase the financial resources of the Foundation to an annual value of at least \$5 million to allow the Foundation to operate in the black with no annual operating deficit by 2026.

Rationale: In recent years, the Foundation has operated in the red. The budget adopted for 2021 projects a shortfall of \$88,858. Following the audit, the Board has restated some expenditures in ways that might affect the size of those deficits; however, a sound institution embarking on the activities proposed in this plan must operate in the black, as several of the vision statements of individual trustees have indicated.

According to the latest annual reports of revenues and expenditures of fraternity and sorority foundations published by Pennington & Company in 2019, 2020, and 2021, the Foundation's net assets grew from \$2,178,569 in 2013 to \$2,540,029 in 2019 (the latest year available), for a growth of \$361,500, or 16.6 percent over six years. (In 2020, the Foundation's assets exceeded \$3.5 million.) Our net assets ranked us 38th among "traditional IFC foundations" in 2013 and 39th in 2019. Over the same period the median net assets of all such foundations grew from \$4,029,840 to \$6,698,158, (66.2 percent), a growth rate four times ours. An increase in the Foundation's assets to \$5 million was an element in several Trustees' vision statements.

Objectives and Actions

To address this goal, over the next five years we will achieve the following objectives.

Objective 19. Asset Growth. The Foundation's assets will increase from \$3.5 million in 2021 to \$5.0 million by 2026, using the following targets:

<u>Target Date</u>	<u>Foundation Assets</u>
December 31, 2022	\$3.8 million
December 31, 2023	\$4.1 million
December 31, 2024	\$4.4 million
December 31, 2025	\$4.7 million
December 31, 2026	\$5.0 million

Owners: Finance Committee and Development Committee

Budgetary Impact: To be determined

Strategies:

A. Cultivate a pool of major donors

- a. Develop a "right people, right ask, right place" initiative that identifies 100 donors with the potential to give more than \$1,000 annually, determining which initiatives those individuals might be interested in supporting to and what the right strategy should be for soliciting their donation.

- i. Find at least five donors interested in contributing to a goal.
 - b. Create a written plan for identifying and cultivating a major donor group.
 - c. Review current giving levels and identify individuals who can move into a “major donor” group by increasing their contributions.
 - d. Leverage the use of Network for Good to identify new high-wealth donors using wealth scores
 - i. On a quarterly basis pull Network for Good scores of donor Brothers
- B. Cultivate a future pool of donors, increasing the graduate donor pool by five percent annually
 - a. Revisit 1895 Club (continued giving program)
 - b. Re-establish the 1895 GOLD (Graduates of the Last Decade) Society to increase young Graduate Brother giving.
 - c. Continue R.B. Stewart Day of Giving
 - i. Follow up with resident donors annually to get them in the habit of giving.
 - ii. Connect R.B. Stewart Day to the 1895 GOLD Society.
 - d. Develop a plan for using Network for Good to identify potential donor groups (such as former donors who have not given in the past year, two years, or more.)
 - e. Build a philosophy of honesty and transparency with donors.
 - f. Achieve a high certification rating with donor-oriented associations (e.g. the “GuideStar” profiles of charities and other non-profits that solicit funding) to develop credibility with potential donors.
- C. Increase the retention rate of current donors by ten percent
 - a. Use notes in Network for Good to determine when to revisit potential donors
 - b. Develop a plan for outreach to specific demographics (such as recent graduates)
 - c. Document all restricted Foundation gifts with clear agreements on their use.

Objective 20. Operating in the Black. Through a combination of increasing revenue and controlling expenditures, the annual operating deficit will be reduced from \$85,858 in 2021 to zero in 2026, as follows:

Target Date	Annual Operating Deficit not to exceed
December 31, 2022	\$72,000.00
December 31, 2023	\$54,000.00
December 31, 2024	\$36,000.00
December 31, 2025	\$18,000.00
December 31, 2026 and thereafter	\$0.00

Owners: Finance Committee and Executive Committee

Budgetary Impact: Operation in the black by 2026.

Strategies:

The Foundation Treasurer, in consultation with the Finance Committee, will develop an annual budget with a deficit that does not exceed the target listed above.

APPENDIX

Tactical Plans to Achieve the Plan's Objectives

Promoting Academic Excellence and Leadership

Objective 1. Academic Excellence. The Foundation will create an Educational Ambassador program in which each Trustee will assist two or more Chapters in developing the academic growth of its Resident Brothers. It is recommended that at least once an academic term, the Trustee be in direct personal communication with Chapter Scholarship Officers and advisors to inform them of Foundation programs and services, and to report educational ideas, issues, and concerns about such programs and services that Resident Brothers have identified. This program will be operational by September 30, 2022. [updated 6/1/2022]

Tactical Plan

Owner: Events & Outreach Committee [updated 3/12/2022]

- Get lists of Chapter Scholarship Officers and Chapter Scholarship Advisors from National Fraternity Staff
- The Foundation President designates the Chapters with which each Trustee will work
- Trustees will be given a list of specific questions/topics to address with their designated Chapters to ensure consistency in information sought
-
- Trustee will reach out to each of their designated Chapter's Scholarship Officer and Scholarship Advisor via e-mail, phone, and/or Zoom at least twice per academic term
- At Board meetings, there will be an agenda item in which Trustees will be asked to report the questions, concerns, etc. from their assigned Chapters.

Budget. No direct expenditures.

Objective 2. Resident Brother Career/Skills Development Program. Explore, in cooperation with the Fraternity, the possibility of creating, by the fall of 2023, a career network and platform of skills-based training resources. The focus will be on career development and include successful strategies and skill sets to realize professional growth. This effort may complement and expand the Fraternity Crow Coach program and include key Chapter operational resources.

Tactical Plan: Develop a Resident Brother Career / Skills Development Program

2. Tactical Effort Type: Program
3. Owner: Events and Outreach Committee, Fraternity Staff
4. Scope:
 - a. Tasks:
 - i. Explore Career Network and/or Platform for Skills-based Training
 - ii. Assess Current Programs Hosted by Fraternity
 - iii. Explore Role-Modeling Systems (hybrid, in-person, virtual)
 - b. Deliverables

- i. Career Network / Platform for all members
 - ii. Role-Model System and Process for all members
 - c. People
 - i. Events and Outreach Committee
 - ii. Fraternity Staff
 - d. Resources
 - i. Existing Programs:
 1. “CultivatingU” Platform which currently has courses on Membership Development, Event Management, Health and Safety Standards, Recruitment, Academic Success, Addiction, Healthy Relationships, Community Service, Accountability, Anti-Discrimination, Sexual Misconduct, Sober Monitors, Risk Management, and No2Hazing.
 2. Crow Coach / Chapter Advisor Program
 3. National LinkedIn Group (only accessible to Brothers in good standing)
 4. Job Workshops: Free to all members, hosted on various topics/fields such as Resume Building, Interview Prep, Graduate School, Finance, Education, Engineering, etc.
 - ii. Discussions with “Graduway”, partnership with “Ambition in Motion”
 - e. Activities
 - i. Career Fair Work (which was done at 105th Convention in Cherry Hill)
 - f. Expected Outcome
 - i. A platform for members to learn skills and for them to be connected with a “mentor” for their field.
- 5. Schedule
 - a. Start Date: December 12, 2021
 - b. End Date: 107th Convention in 2023
- 6. Budget. \$18,000, as follows:
 - a. \$5,500 annually to E-Concepts, Inc. (hosts CultivatingU)
 - b. \$3,000 for Career Fair (pulled from 105th Convention finances)
 - c. \$3,000 for Crow Coach / Advisor Training (pulled from past EF budgets)
 - d. \$1,500 for postage for alumni outreach
 - e. \$5,000 for a platform such as Graduway

7. Communication Plan

- a. Fraternity staff will send communications to Graduate and Resident Brothers, Events & Outreach Committee will develop messaging.
- b. Quarterly outreach should be sufficient

8. Risks

- a. Low / Medium Risk
- b. Volunteer led efforts (Foundation has one staff member)
- c. Fraternity staff infrastructure / change in responsibility

*Objective 3. **Newly Graduated Brother Education.*** During 2022 and 2023, the Foundation will develop a process or module for senior Resident Brothers and recent Graduate Brothers to serve as good role models for undergraduate Resident Brothers. The program will be rolled out in relation to Convention in 2023. Beginning in 2024, the Foundation will evaluate its success at least annually.

Tactical Plan: Create a process / module for upperclassmen Resident Brothers and recent Graduate Brothers to be good role-models for future Brothers

2. Tactical Effort Type: Program

3. Owners: Events and Outreach Committee, Fraternity Staff

4. Scope:

a. Tasks:

- i. Assess current practices of Fraternity for transitioning from Resident to Graduate Brother
- ii. Determine responsibilities of a Graduate Brother in both Fraternity and Foundation realms
- iii. Determine opportunities of a Graduate Brother in both Fraternity and Foundation realms
- iv. Develop online program for both responsibilities and opportunities

b. Deliverables

- i. More connected Graduate Brothers who in turn could become volunteers / key players in the Fraternity and Foundation

c. People

- i. Events and Outreach Committee
- ii. Fraternity Staff

d. Resources

- i. Existing Work:

1. Fraternity COVID-19 Coalition created an action plan that is being beta tested now with current seniors. The plan includes a letter to the seniors and then a specific gift to certain officers for their service. Letter details the current responsibilities and opportunities that the Brother may access at no charge post-graduation, asks for them to update their contact information for post-graduation, and how to become involved pre-graduation.
 - ii. Regional Graduate Clubs
 1. Currently very little activity but this was due to pandemic. Work was done to develop event ideas and infrastructure to have events post-pandemic.
 - e. Activities
 - i. Brother outreach – Brothers calling recent Graduate Brothers in order to update / check-in and discuss new program.
 - f. Expected Outcome
 - i. A larger pool of individuals to pull volunteers, perspectives and insight from.
5. Schedule
- a. Start Date: August 1, 2021 (Fraternity COVID-19 Coalition), December 1, 2021 (this tactical plan)
 - b. End Date: Assessment on July 1, 2021 (Fraternity COVID-19 Coalition), 107th Convention (this tactical plan)
6. Budget: \$3,000, as follows:
- a. \$2,000 for new program/modules (assuming on E-Concepts website)
 - b. \$1,000 for postage for alumni outreach
7. Communication Plan
- a. Fraternity staff sends letter in mail and electronically to current senior members on December 1, 2021.
 - b. Ascertains the amount of recognition gifts that need to be purchased by February 1, 2022.
 - c. Schedule outreach to recent Graduate Brothers (defined as 2018 – 2021 Graduation Year) and follow-up with coordinated outreach.
 - d. Ship recognition gifts and thank you letters to Brothers in April 2022.
8. Risks
- a. Low / Medium Risk
 - b. Volunteer-led efforts

- c. Fraternity staff infrastructure / change in responsibility

Educational Sponsorships

*Objective 4. **Foundation-Funded National Fraternity Educational Programs.*** Annually, the Foundation will provide input on content for any Fraternity educational programs that receive funding from the Foundation.

Tactical Plan: The Foundation determines a structure for receiving and evaluating educational grant proposals.

- Tactical Effort type: Process
- Owners – Executive Committee, Programs & Services Committee
- Scope – The Foundation should ensure quality content when funds are spent to support Fraternity educational programming. Because no committee is currently responsible for this review, the Executive Committee must first determine the structure for evaluating education-related requests from the Fraternity. These additional responsibilities will require the Executive Committee either to provide additional support to an existing committee (i.e. Programs & Services) or to create a new group (i.e. Education Committee), either of which requires a new personnel commitment. The Executive Committee will determine the appropriate review structure then task that group with developing the grant process and timeline. The submitter recommends having educational grants be run through the Programs & Services Committee as that committee already has experience with grant processes, and this way we don't have two different committees involved with grant review. However, this might require the creation of a new subcommittee for the Programs & Services Committee or at least 1-2 additional committee members focused primarily on these educational grants.
- Schedule
 - Start Date: January 2022
 - Finish Date: December 2023
 - Milestone Dates for Progress
 - March 2022 - Executive Committee determines what group will oversee the educational grant process (likely the Programs & Services Committee or a new Education Committee).
 - July 2022 – President appoints sufficient Board members and volunteers to the appropriate committee to oversee the grant
 - September 2022 - The committee creates the draft of a grant application, which will include the following components:
 - Overview of the initiative to be funded
 - Total funding request
 - Timelines for submitting educational content to the Foundation for review
 - Assessment mechanisms to determine if learning goals for the program were met.
 - December 2022 - The committee finalizes grant process to be used for funding requests currently allotted in the fiscal year budget.
 - May 2023 – The committee develops additional tactics based on current progress.

- Budget
 - Direct expenses: none
 - Indirect expenses: The Foundation must consider the funds being allocated for educational programs. In most cases, these are built into the current budget requests. The Foundation must also consider the time commitment for Board members and volunteers to participate in the committee and the opportunity cost of devoting time to this project rather than other commitments.
 - Communication Plan: The committee will provide general updates through their board meeting reports.
 - Risks:
 - Insufficient Board and volunteer interest in supporting this additional responsibility of the Programs and Services Committee or a new committee
 - Poor communication/collaboration with the Fraternity staff.
 - If the tactic is delayed or unsuccessful, the Foundation misses an opportunity to improve the educational resources provided to Fraternity members and lacks the information necessary to make informed financial decisions.

*Objective 5. **Evaluation of Educational Programs.*** By December 31, 2022, the Foundation will establish a multi-year schedule to evaluate those educational programs, using the feedback to provide a recommendation for future funding allocations.

Tactical Plan: The Programs & Services Committee (or newly formed committee) will produce a complete annual timeline for receiving educational program grant requests, starting with programs in the 2023 calendar year.

- Tactical Effort Type: Project
- Owner: Programs & Services Committee (note that “Programs & Services Committee” may be replaced by a new committee wherever mentioned in this tactic)
- Scope: The committee will create the full timeline for reviewing education-related grant requests coming to the Foundation. This timeline should align with the budgeting process and will be part of the final grant process. The committee will need to consider that content will not be 100 percent finalized by the time a funding request is made; therefore, the timeline must account for initial reviews along with assessing programs after they occur. Some important deadlines include:
 - Submission deadline
 - Timeline for submitting updates and educational content to the Foundation
 - Timeline for submitting post-program assessment information to the Foundation
- Schedule:
 - Start Date: July 2022
 - End Date: December 31, 2023
 - Milestone Dates for Progress:
 - July 2022 – Programs & Services Committee is tasked with overseeing educational grants with sufficient volunteer support assigned by the Executive Committee.
 - September 2022 - Programs & Services Committee creates the draft of a grant application.

- December 2022 - Programs & Services Committee finalizes grant process to be used for funding requests currently allotted in the fiscal year budget.
 - December 2023 – Programs & Services Committee makes changes to 2024 calendar based on lessons learned from 2023 implementation
 - December 2024 – Programs & Services Committee adopts changes to the grant process.
- Budget
 - Direct expenses: none
 - Indirect expenses: The Foundation must consider the funds being allocated for educational programs. In most cases, these are built into the current budget requests. The Foundation must also consider the time commitment for Board members and volunteers to participate in the Programs and Services Committee and the opportunity cost of devoting time to this project rather than other commitments.
 - Communication Plan: The chair of the Programs and Services Committee or their designee will take the lead on communication efforts. The chair must be in regular communication with the Fraternity staff about timelines and will submit general updates to the Foundation Board through meeting reports.
- Risks
 - Insufficient Board and volunteer interest in supporting this expansion of the Programs and Services Committee
 - Poor communication/collaboration with the Fraternity staff.

If the tactic is delayed or unsuccessful, the Foundation misses an opportunity to improve the educational resources provided to Fraternity members and lacks the information necessary to make informed financial decisions.

Objective 6. Supporting Resident Brothers' Educational Needs. Annually, the Foundation will meet with the Fraternity to discuss educational needs of undergraduates and determine a joint plan for supporting those educational initiatives.

Tactical Plan

Owners: Programs & Services Committee, National Fraternity

- At least annually, the Foundation will schedule meetings with the National Fraternity to identify and discuss existing and emerging educational needs of Resident Brothers and identify ways to address those needs.
- Budget: No direct impact. The decisions on meeting educational needs will have budgetary implications that cannot be known in advance.

Objective 7. New Educational Sponsorship. Develop at least one new Educational Sponsorship to support educational programs for which the Foundation and the Fraternity currently have no funding and new programs identified by the Brotherhood.

Tactical Plan 1: Use e-mail campaign to raise funds through an on-line campaign for this specific project of an endowed educational sponsorship and/or outreach to specific corporate sponsors.

1. Identify Tactical Effort Type
 - a. Program: Network for Good (current tool)
 - b. Project: Set up e-mail campaign including graphics and content for e-mail blast
2. Include the following for each Effort in the Tactical Plan
 - a. Owner: Development Committee
 - b. Scope: Network for Good -email campaign tool to receive funds toward this specific campaign to support an Educational Sponsorship. Raise the appropriate funds to support educational program
 - c. Schedule: to be determined
 - d. Budget: Network for Good, Director of Development
 - e. Communication Plan: Periodic updates on fundraising goal show on Network for Good Dashboard and provided to Trustees
 - f. Risks: Not enough donors are interested in funding THE educational program or corporation is not at level needed to execute successful program

Tactical Plan 2: Develop a new corporate sponsorship page on the website with new information about the programs that they can support (InDeed Institute, Conclave, etc.) and ways that they can get involved in the actual program (i.e. Keynote Speaker, Educational Sessions, Tabling at Events, Dinner Sponsorships, T-shirt Sponsorships, Mini-Career Fairs, etc.)

- a. Program: Use Facebook and Instagram to market the new website and possible Network for Good to handle some corporate donations
- b. Project: Create a new website with input from Foundation members and alumni from potential corporate sponsors
- c. Owner: Development Committee and Website Committee
- d. Scope: Create brand new content and page for corporate development linked to the homepage of alphachirho.org and on AXPEF separate from Ways to Donate page since that is geared toward alumni and if possible, use Network for Good to have corporate campaign donations secured and posted for easy accounting
- e. Schedule: ASAP with completion date of February 2022
- f. Budget: Network for Good, Director of Development
- g. Communication Plan: Provide updates on website creation and launch to everyone in Network for Good database as well as use social media (Instagram/Facebook)
- h. Risks: Corporations are not interested in supporting these types of programs and we need to find new educational programs that they will invest in and participate in.

If the tactic is delayed or unsuccessful, the Foundation misses an opportunity to improve the educational resources provided to Fraternity members and lacks the information necessary to make informed financial decisions

*Objective 8. **Funding for Educational Sponsorships.** Grow the endowment for Educational Sponsorships (including scholarships, grants, and loans) to increase the amount of money that can be provided for each.*

Tactical Plan 1: Cultivate donors for underfunded scholarships before we establish entirely new scholarships

- a. Program: Use Facebook and Instagram to market underfunded scholarships to potential donors through Network for Good and through personal relationships and stewardship
- b. Project
- c. Owner: Development Committee
- d. Scope: Use Network for Good to identify potential donors that have provided funds for scholarships in the past
- e. Schedule: On-going conversations and outreach throughout the year
- f. Budget: Network for Good, Director of Development
- g. Communication Plan: Provide updates on website to see how we are reaching our goals for everyone to see and utilize social media (Instagram/Facebook)
- h. Risks: Not enough donors to off-set the cost of unfunded scholarships each year or not enough to create an endowment for each scholarship

Tactical Plan 2: Identify the Educational Sponsorship that can be funded through a corporate foundation that is a win-win for both organizations including named scholarships (i.e. Coca-Cola Marketing Leadership Scholarship, Microsoft Scholarship).

- a. Program: Use Facebook and Instagram to market the new corporate website and possible Network for Good to handle some corporate donations
- b. Project: Create a new website with input from Foundation members and alumni from potential corporate sponsors to include scholarship opportunities
- c. Owner: Development Committee and Website Committee
- d. Scope: Create brand new content and page for corporate development linked to the homepage of alphachirho.org and on AXPEF separate from Ways to Donate page since that is geared toward alumni and if possible, utilize Network for Good to have corporate campaign donations secured and posted for easy accounting
- e. Schedule: ASAP with completion date of February 2022
- f. Budget: Network for Good, Director of Development
- i. Communication Plan: Provide updates on website creation and launch to everyone in Network for Good database as well as utilize social media (Instagram/Facebook)
- j. Risks: Corporations are not interested in supporting scholarships and we need to find new opportunities that they will invest in.

Communication

Objective 9. Donor Communication & Recognition. By end of the first quarter of 2022, the Foundation will inventory and assess current donor communication platforms, including database and tools (written and multi-media) for review by Trustees. As necessary, it will develop new personal communication vehicles, including those that target major donors. In 2023, it will define and differentiate communication needs for different donor tiers and for persons in different stages of the lifecycle since materials directed to retirees, for example, are inappropriate for recent graduates. This will increase donor communication and recognition of higher donor levels.

Tactical Plan: Pending.

Owner: Development Committee.

Objective 10. Board Media Communication & Use. The Foundation will review Foundation-related material posted on digital media and develop instructional tools to train Trustees and staff in their use. It will develop new communication platforms and tools as they become available.

Tactical Plan: Align staff to work with Board on digital media communication & use

- Tactical Effort type: Process
- Owner – Governance Committee
- Scope - Paid staff are needed to develop digital media content and strategies. The Governance Committee will develop language for a future job description that will include these responsibilities; the Governance Committee will then work with relevant staff to fulfill objective and review progress.
- Schedule
 - Start Date: September 2022
 - Finish Date: December 2024
 - Milestone Dates for Progress
 - December 2022 - write bullet points for job description for paid staff to support this objective. These bullet points will outline responsibilities including:
 - Review Foundation-related material posted on digital media
 - Develop instructional tools to train Trustees and staff in their use
 - Develop new communication platforms and tools as they become available
 - April 2024 - AXPEF prepared to post job description that includes these responsibilities or to assign these responsibilities to a current paid staff member
 - July 2024 - Target for position to be filled
 - December 2024 - Staff member begins discussing media communication & use at Board meetings as appropriate.
- Budget
 - Direct expenses: paid staff time. The Executive Committee will determine what percentage of staff time will be focused on communication and use of digital media (ex. 5 percent of full-time position).
 - Indirect expenses: Time of the Governance Committee between Board meetings; time for the full Board meetings
- Communication Plan:
 - External communication: The communication is part of the larger plan to hire additional staff; communicating position and requirements to potential staff
 - Internal communication: The paid staff will educate Trustees about digital media and train on their use, as needed.
- Risks:
 - Unable to keep up with changes in digital media
 - Improper prioritization of staff needs (i.e., leaving more critical needs unfilled because digital media & communication was prioritized too highly)
 - Low Return on Investment

Objective 11. Scholarship Recognition. As part of the Convention agenda beginning in 2023, the Foundation will host a small reception for new and previous scholarship winners and publicly post their names for all attendees to access. This endeavor will stimulate commitment among younger Brothers, encouraging them to volunteer for leadership positions and financially support the Foundation in the future.

Tactical Plan:

1. Tactical Effort Type: Program
2. Owner: Programs & Services Committee, Fraternity Staff
3. Scope:
 - a. Tasks:
 - i. Identify key player on Events & Outreach Committee or Programs & Services Committee to work with Fraternity Staff regarding Convention scheduling and program.
 - ii. Work with Fraternity staff to reach out to winners on an individual basis
 - iii. Invite high-level donors who are underwriting scholarship costs to reception
 - iv. Determine financial commitment to have winners attend reception (if in-person)
 - b. Deliverables
 - i. Reception at Convention similar to the current Scholarship Luncheon
 - c. People
 - i. Events and Outreach Committee
 - ii. Fraternity Staff
 - d. Resources
 - i. Existing Scholarship Luncheon:
 1. Current luncheon occurs in-between business meeting sessions during the Convention
 2. Scholarship winners are announced including R. B. Stewart and Coughlan
 3. Review current script and discuss what adjustments need to be made.
 - e. Activities
 - i. Review current structure and assess for adjustments
 - f. Expected Outcome
 - i. An event in which the Fraternity and Foundation celebrate winners and provide them an outlet to network with key Foundation and Fraternity players.
4. Schedule
 - a. Start Date: December 1, 2021
 - b. End Date: 107th Convention in 2023
5. Budget
 - a. \$100 for personal outreach to winners
 - b. Paid staff time
6. Communication Plan
 - a. Programs and Services Committee member and Fraternity staff will send communications to past and current winners about reception
 - b. Foundation Director of Development will invite high donors
7. Risks

- a. Low Risk
- b. Volunteer Led efforts
- c. Fraternity staff infrastructure / change in responsibility

Objective 12 Chapter Outreach. The Foundation will enhance Chapter outreach in at least two ways: First, by the end of the first quarter of 2022, it will develop a script outline of key points for Trustees and staff to use when communicating with Chapters and Resident Brothers that will include an overview of online materials regarding scholarships, grants, and loans.

Second, The Foundation will periodically submit pertinent information about programs and services to the Fraternity for publication in venues such as “From the Crow’s Nest.” The objective is to provide consistent and accurate communication and align with Fraternity processes.

Tactical Plan:

Owner: Executive Committee

Budget: No direct impact.

- The existing script needs fine-tuning. It was used on Instagram to inform undergraduates.
- A list of the scholarships, grants, and loans will be developed and put in each Trustee’s hand for them to have talking points to discuss with the undergraduates.
- “Our house” app will be used to communicate with the Chapters.
- The Foundation should look into starting our own publication, similar to the former *Foundation Focus*. This could be a two-page mainly electronic publication with the following regular content:
 1. A focus on a Brother, donor or not.
 2. A focus on a Trustee or volunteer.
 3. A focus on one of the Scholarship Recipients.
 4. A plea for donations soft or hard.

Some could be printed and mailed to those without emails.

INFRASTRUCTURE RESOURCES

Objective 13. Staffing. Make a regular full-time appointment of a Director of Development by year-end 2021. Identify and hire an Education/Marketing Manager by the end of the first quarter of 2023. Review and reorganize Standing Committees in 2022 to accommodate changing priorities and balance workload.

Tactical Plan 1:

- 1) Project
 - a) Owner – Executive Committee

- b) Scope
 - i) Establish search committee for staffing hires
 - ii) Develop Director of Development and Education/Marketing Manager job descriptions
 - iii) Conduct interviews as necessary
 - iv) Make full-time hires
- c) Schedule
 - i) Director of Development
 - (1) Search committee and job description were completed Q3 2021. Additional revision may be required, and if so to be completed Q1 2022
 - (2) Interviews (if required), make final candidate recommendation, and extend job offer Q2 2022
 - ii) Education/Marketing Manager
 - (1) Develop job description Q3 2022
 - (2) Conduct interviews Q4 2022
 - (3) Make final candidate recommendation and extend job offer Q1 2023
- d) Budget – estimated at \$500 for T&E associated with hiring process. Total compensation for staff to be determined by Executive Committee and communicated appropriately through budgeting process.
- e) Communication – monthly updates to executive committee, and milestone progress reporting to full Board. Public announcement to Brotherhood and Foundation upon formal acceptance by candidates
- f) Risks
 - i) acceptable candidates cannot be identified – project delayed until candidates can be identified
 - ii) selected candidate(s) do not accept position – project delayed while hiring process is restarted
 - iii) funding cannot be secured for salaries – project start is delayed, or hiring process frozen until funding can be identified.

Tactical Plan 2: During 2022, assess staff including committees needed to achieve the plan’s objectives and continue existing programs. In 2022-23, realign headcount expense from the Fraternity to the Foundation to achieve balance.

- 1) Project
 - a) Owner – Executive Committee
 - b) Scope

- i) Evaluate alignment of current committee structure and current / proposed staff with Long Term Plan
 - ii) Recommend revised structure including implementation plan
 - iii) Implement new committee structure after obtaining Board approval
 - iv) Develop job description for new / revised staff positions
 - v) Recommend realignment of staff, and opening new positions that coordinates with required funding availability
- c) Schedule
- i) Evaluation of current committees and staff Q1 2022
 - ii) Recommendation of revised structure and implementation plan Q2 2022
 - iii) Approved committee changes fully implemented Q1 2023
 - iv) Develop job descriptions for new / revised staff Q2 2023
 - v) Recommend realignment of staff Q2 2023
 - vi) Future staffing plan Q3 2023
 - (1) Execute on staffing plan after Board approval
- d) Budget – nominal for 2022 and 2023. T&E required for hiring processes will be submitted for approval through annual budgeting process in-line with staffing plan time line
- e) Communication – monthly updated to Executive Committee, and milestone progress reporting to the full Board. Public announcement to Brotherhood and Foundation for:
- i) Board-approved committee changes
 - ii) Board-approved revisions to staff alignment
 - iii) Posting of new positions per staffing plan
 - iv) Formal acceptance by candidates for future staff position hires
- f) Risks
- i) acceptable candidates cannot be identified – project delayed until candidates can be identified
 - ii) selected candidate(s) do not accept position – project delayed while hiring process is restarted
 - iii) Funding cannot be secured for salaries – project start is delayed, or hiring process frozen until funding can be identified.

*Objective 14. **Volunteer Pool.*** By 2026, using student interns (unpaid) and retirees for specific project needs, expand the Foundation’s volunteer pool as resources to staff. On an annual basis, host combined volunteer recognition events for national and local level volunteers, for

example, Building Corporation and other Graduate Chapter officers who contribute and adhere to the principles of Alpha Chi Rho.

Tactical Plan:

1. Tactical Effort Type: Program
2. Owners: Executive Committee, Fraternity Staff
3. Scope:
 - a. Tasks:
 - i. Assess current practices of Fraternity / Foundation on finding volunteers
 - ii. Determine changes to those practices if needed
 - b. Deliverables
 - i. A solid volunteer pool for the Fraternity and Foundation to find potential Trustees and key volunteers
 - c. People
 - i. Executive Committee
 - ii. Fraternity Staff
 - d. Resources
 - i. Existing Framework:
 1. Volunteers fill out online form
 2. Fraternity staff meets with volunteer on Zoom to assess time commitment and level of involvement. One key question asked is if they would want to volunteer first with the Fraternity or Foundation.
 3. If volunteer chooses Fraternity, the individual is enrolled in an advisor course on CultivatingU.
 - e. Activities
 - i. Brother outreach – Brothers calling recent Graduate Brothers in order to update / check-in and discuss program and procedures.
 - f. Expected Outcome
 - i. A larger pool of individuals to pull volunteers, perspectives and insight from.
4. Schedule
 - a. Start Date: December 1, 2021
 - b. End Date: Assessment on July 1, 2021

5. Budget

- a. \$250 for outreach to volunteers

6. Communication Plan

- a. Fraternity staff and Foundation Members reach out to current volunteers to assess their involvement and who they might know are good volunteers. We can also ask those volunteers where they see the Fraternity and Foundation going.

7. Risks

- a. Low / Medium Risk
- b. Volunteer Led efforts (Foundation has one staff member)
- c. Fraternity staff infrastructure / change in responsibility

Objective 15 Processes: By mid-year 2022, key processes will be evaluated to streamline office operations and improve productivity. The current project management system may be used as a resource guide providing that maintenance is manageable and not replicated.

Tactical Plan: Pending.

Owner: Development Committee.

Objective 16. Board Self-Assessment. By the third quarter of 2022, prepare a self-improvement plan to increase participation and productivity.

Tactical Plan 1: Prepare a self-improvement plan to increase participation and productivity.

- Tactical Effort type: Project/Process
- Owner: Governance Committee
- Scope: Develop a survey tool to collect data about Board performance and priorities. This tool could look like the McKinsey & Company Self-Assessment tool with alternations specific to our board. Then, use the survey tool on a scheduled basis to collect information from Trustees, analyze the data, and discuss relevant findings to promote future change.
- Schedule
 - Start Date: January 2022
 - Finish Date: December 2023
 - Milestone Dates for Progress
 - September 2022 - Finalize the self-assessment tool
 - April 2023 - The Board completes its first self-assessment
 - September 2023 - Disseminate results for the 3Q board meeting

- December 2023 - The Governance Committee will determine frequency of use of the assessment tool (ex. Every 5 years) and set a target date for the next implementation
- Budget
 - Direct expenses: Paid staff to create report and analyze trends (estimate: 20 hours)
 - Indirect expenses: Time for the governance committee to manage the process and for all Trustees to complete the self-assessment tool
- Communication Plan:
 - The tool can be posted on the password-protected page of website
 - Governance Committee will communicate timelines for completion to Trustees and lead conversation at the September 2023 meeting about results
 - AXPEF staff will analyze results and communicate them to the Governance Committee.
- Risks:
 - Token participation by trustees (i.e. they fill out the form but don't really think about it. There is low risk of this harming the Foundation.
 - The assessment will identify additional problems or projects to tackle without the structure in place to address them

Tactical Plan 2: Create self-assessment tool for individual performance.

- Tactical Effort type: Project/Process
- Owner: Governance Committee
- Scope: Develop a tool for board members to assess their performance and priorities as a Trustee. We will ask them to think about their contributions to their current committees as well as aspirations where they want to go in the future (ex. executive committee roles; discontinuing committee participation; seeking roles on other committees). These self-assessments will be reviewed by the executive committee and used in assigning committee roles in subsequent years.
- Schedule
 - Start Date: January 2022
 - Finish Date: September 2023
 - Milestone Dates for Progress:
 - September 2022 - finalize the self-assessment tool
 - April 2023 - board members complete first individual self-assessment

- May 2023 - Board President reviews self-assessments and uses results to make committee assignments for the 2023-2024 term; President shares any trends in Trustee responses at the May board meeting
 - September 2023 - The Governance Committee will review the process and determine timeline for future, starting with the frequency (ex. annual).
- Budget
 - Direct expenses: none
 - Indirect expenses: Time for Governance Committee to oversee process, Board members to complete individual self-assessment, and President to review results.
- Communication Plan:
 - The tool can be posted on the password-protected page of website
 - Governance Committee will communicate timelines for completion to Trustees
- Risks:
 - Token participation by Trustees (i.e. they fill out the form but don't really think about it). There is low risk of this harming the Foundation.
 - The assessment will identify additional problems or projects to tackle without the structure in place to address them.

Tactical Plan 3: Align staff to work with Board on digital media communication & use

- Tactical Effort type: Process
- Owner: Governance Committee
- Scope: Staff are needed to develop digital media content and strategies. The Governance Committee will develop language for a future job description that will include these responsibilities; the Governance Committee will then work with relevant staff to fulfill objective and review progress.
- Schedule
 - Start Date: September 2022
 - Finish Date: December 2024
 - Milestone Dates for Progress
 - December 2022 - write bullet points for job description for paid staff to support this objective. These bullet points will outline responsibilities including:
 - Review Foundation related material posted on digital media
 - Develop instructional tools to train trustees and staff in their use
 - Develop new communication platforms and tools as available

- April 2024 – Foundation prepared to post job description that includes these responsibilities or to assign them to a current paid staff member
 - July 2024 - Target for position to be filled
 - December 2024 - staff member begins discussing media communication and use at Board meetings as appropriate.
- Budget
 - Direct expenses: paid staff time. The Executive Committee will determine what percentage of staff time will be focused on communication and use of digital media (ex. 5 percent of full-time position).
 - Indirect expenses: Time of the Governance Committee between Board meetings; time for the full Board meetings
- Communication Plan:
 - External communication: The communication is part of the larger plan to hire additional staff; communicating position and requirements to potential staff
 - Internal communication: The paid staff will educate Trustees about digital media and train on their use, as needed.
- Risks:
 - Unable to keep up with changes in digital media
 - Improper prioritization of staff needs (i.e. not leaving more critical needs unfilled because digital media & communication was prioritized too highly)
 - Low Return on Investment

Objective 17. Donor Management. By the second quarter of 2022, review, source, and test alternative (other than the one now used), wealth screening tools and systems that are easily managed and linked to various digital communication platforms. Criteria should include the ability to provide accurate donor profiles, identify and track communications, and respond in a timely manner to donations submitted. Minimum selection criteria are cost, ease of use, and reporting. During 2023, upgrade current systems as needed.

Tactical Plan: Pending.

Owner: Development Committee.

Objective 18. Office Setting/Location. By the end of the first quarter of 2022, decide whether to sell or hold and repair the R.B. Stewart National Headquarters building at 109 Oxford Way, Neptune, New Jersey, based on considerations including: professional inspection report, impact of relocation on staff, and New Jersey notice requirements for lease termination.

If the Foundation decides to sell the property and relocate, the decision should be made by year-end 2023 if it is practical and meets legal requirements. Criteria for a new headquarters are: accessibility for staff, affordable, can accommodate changing work methods, and support five-year growth plan and beyond.

Tactical Plan: Pending.
Owner: Headquarters Committee.

FINANCES

Objective 19. Asset Growth. The Foundation’s assets will increase from \$3.5 million in 2021 to \$5.0 million in 2026 using the following targets:

<u>Target Date</u>	<u>Foundation Assets</u>
December 31, 2022	\$3.8 million
December 31, 2023	\$4.1 million
December 31, 2024	\$4.4 million
December 31, 2025	\$4.7 million
December 31, 2026	\$5.0 million

- A. Cultivate a pool of major donors
 - 1. Develop a “Right people, right ask, right place” initiative that identifies 100 donors with potential to give more than \$1,000 annually to determine which initiatives that individual might be interested in contributing to and what the right strategy should be for soliciting their donation.
 - 2. Find at least five donors interested in contributing to a goal.
 - 3. Create a written plan for identifying and cultivating a major donor group.
 - 4. Review current giving societies and identify individuals who can move into a “major donor” group by increasing their contributions.
 - 5. Leverage the use of Network for Good to identify new high-wealth donors using wealth scores
 - 6. On a quarterly basis pull Network for Good scores of donors who are Alpha Chi Rho Brothers

Tactical Plan:

- a. Process
 - i. Self-Assessment of Trustees’ Level of Fundraising Assistance to Director of Development
 - ii. List of major donors with Wealth Scores provided by Network for Good (each quarter)
 - iii. Trustees introduce major donors to Director of Development (from list)
 - iv. Utilize LinkedIn as another tool to identify and connect with major donors
 - v. Develop a Planned Giving Program brochure that is easy to understand

b. Programs

- i. Network for Good
- ii. Salesforce
- iii. LinkedIn
- iv. Survey Monkey

c. Project

- i. Develop survey in Survey Monkey

d. Owner: Director of Development and key Trustees

e. Scope:

- i. Develop a small on-line survey to determine Trustee level of assistance in fundraising including the Development Committee,
- ii. Run report of major donor targets from Network for Good, Send targeted contacts to key Trustees to make introductions to Director of Development,
- iii. Director of Development have a conversation with potential major donors, Based on Network for Good lists,
- iv. Director of Development will use Linked-In to connect with more major donors with potential in order to have a conversation.

Outcome is to identify 5 major donors to pursue from this process plus other donors for consistent \$1,000 gifts

f. Schedule

- i. Start date: December 12, 2021, Finish date: December 31, 2021,
- ii. Survey sent by December 13, Response from Trustees due by December 23.
- iii. Send major donor list to identified Trustees for introduction of Director of Development by December 15, Trustee introduction between December 15th and December 31st.
- iv. December 31–January 31: contacts and conversation should be happening between Director of Development and major donors.
- v. Revisit schedule as needed

g. Budget: Director of Development salary

- h. Communication Plan:
 - i. Director of Development will create and send survey to Trustees and then send list of major donors based on survey.
 - ii. Director of Development will input data in Network for Good and run reports every quarter
- i. Risks: Trustees unwilling to help with fundraising efforts and donor cultivation for major donors
- B. Cultivate a future pool of donors, increasing the graduate donor pool by five percent annually
 - d. Revisit 1895 Club (continued giving program)
 - e. Re-establish the 1895 GOLD (Graduates of the Last Decade) Society to increase young alumni giving.
 - f. Continue R.B. Stewart Day of Giving
 - i. Follow up with resident donors each year to get them in the habit of giving.
 - ii. Connect R.B. Stewart Day to the 1895 GOLD Society.
 - g. Develop a plan for using Network for Good to identify potential donor groups (such as donors who have not given in the past year, two years, or more.) Build a philosophy of honesty and transparency with donors.
 - h. Achieve a high certification rating with donor-oriented associations (ex. GuideStar) to develop credibility with potential donors.

Tactical Plan:

- a. Process
 - i. Assess the success of the 1895 Club to see if beneficial and possibly have different tiers- \$18.95 or \$1895 or \$108.95 or \$180.95 club
 - ii. Determine the steps to re-establish the 1895 GOLD Society and see how it can be tied to R.B. Stewart Day without muddying the waters
 - iii. Create a criterion in Network for Good to identify GOLD and lapsed donors from R.B. Stewart Day from last two to three years (two separate lists)
 - iv. Determine the steps to re-establish the Garnet Knight Challenge and see how it can be deployed successfully after R.B. Stewart Day

- b. Programs
 - i. Network for Good
 - ii. Salesforce
 - iii. R.B. Stewart Day of Giving
 - iv. Garnet Knight Challenge
- c. Project
 - i. 1895 Club and 1895 GOLD Club marketing campaign
 - ii. R.B. Stewart Day marketing campaign
 - iii. Garnet Knight Challenge marketing campaign
- d. Owner: Director of Development and key Trustees
- e. Scope:
 - i. Datamine Network for Good based on 1895 Club and determine next steps,
 - ii. Determine the target audience for 1895 GOLD Society within Network for Good.
 - iii. Create a new marketing campaign via e-mail through Network for Good with a Video (possibly).
 - iv. Network for Good now has the capability to send videos via e-mail (TikTok era) We may need assistance from a young Graduate Brother to help create and star in the video.
 - v. Create a list of lapsed donors and send a targeted e-mail to this group for R.B. Stewart and other days of giving.
- f. Schedule:
 - i. Start in January 2022, deploy marketing campaign leading up to R.B. Stewart Day of Giving,
 - ii. 1895 GOLD and possibly 1895 CLUB.
 - iii. After R.B. Stewart Day, start deploying Garnet Knight Challenge.
- g. Budget: Director of Development salary and could pay for video production or gifted by alumni

h. Communication Plan: Director of Development will produce a report on the 1895 Club, 1895 GOLD, and R.B. Stewart Day of Giving and determine correct course for each campaign

i. Risks: Too many contacts with same donors about each campaign. May need to spread out campaigns in different times of the year

C. Increase the retention rate of current donors by ten percent

- a. Use notes in Network for Good to determine when to revisit future donors
- b. Develop a plan for outreach to specific demographics (such as recent graduates)
- c. Document all restricted Foundation gifts with clear agreements on their use.

Tactical Plan:

- a. Process
 - i. Run report in Network for Good each quarter to determine when to revisit donors
 - ii. Setting up a reminder system to identify who to contact via e-mail or phone
 - iii. Run report in Network for Good to determine outreach to young alumni to connect with Foundation
- b. Program
 - i. Network for Good
 - ii. Salesforce (it looks like this is already built in)
- c. Project
- d. Owner: Director of Development and key Trustees
- e. Scope
 - i. Director of Development or key Trustees send e-mail via Network for Good to each donor to request a conversation and to thank them for their support and ask for their continued support of the Foundation. This will need to happen each quarter of the year.
 - ii. During summer, send a focused communication to young alumni about connecting with the Foundation
- f. Schedule: Ongoing – each quarter of year, re-evaluate after each quarter
- g. Budget: Director of Development salary

h. Communication Plan: Run reports in Network for Good each quarter to track giving progress and send updates to Trustees.

i. Risks: E-mail contacts are ignored and follow up is not successful. Landmark update could affect some donors' willingness to respond and giving may decline as a factor.

Objective 20. Operating in the Black. Through a combination of increasing revenue and controlling expenditures, the annual operating deficit will be reduced from \$85,858 in 2021 to zero in 2026, as follows:

<u>Target Date</u>	<u>Annual Operating Deficit not to exceed</u>
December 31, 2022	\$72,000.00
December 31, 2023	\$54,000.00
December 31, 2024	\$36,000.00
December 31, 2025	\$18,000.00
December 31, 2026 and thereafter	\$0.00

Tactical Plan:

- a. Process
 - i. Identify donors to underwrite existing underfunded scholarships
 - ii. Identify cost savings in budget preparation
 - iii. Identify any short falls that need to be funded
 - iv. Quarterly review vs actual spending
- b. Program
 - i. QuickBooks Cloud reporting
- c. Owners: Finance Committee and Executive Committee
- d. Scope:
 - i. Yearly budget formation to determine shortfalls and cost savings
 - 1. Culmination of reviews of quarterly budget v. actual and creating budget during Q4 of each year by CEO, Treasurer, and President
 - ii. Ongoing donor solicitation to underwrite scholarships by Director of Development
- e. Schedule:
 - i. Budget formation will be conducted starting Q4 2021 and will be done in Q4 for subsequent years
 - ii. Budget v. actual review every quarter to determine spending levels are on target
 - iii. Director of Development will conduct quarterly review of donors to identify opportunities for scholarship underwriting
- f. Budget:

- i. Director of Development salary and CEO salary
- g. Risks:
 - i. Determining National Program and Services Grant Budget during current year
 - ii. Falling short of development activities to underwrite scholarships