



Alpha Kappa Alpha Sorority, Incorporated®



Leadership Seminar

Pathways to SOAR:

Expanding Your Leadership Potential

Let's Be Strategic: Soaring to Greater Heights with Strategic Planning

Soror Kimberly Jeffries Leonard, Chair and

*Soror Mona Calhoun, Member – Strategic Planning and
Partnership Committee*

Chicago



OBJECTIVES

- The Purpose of Strategic Planning
- Update on 2018 – 2028 National Planning Strategy
- Review 2018 – 2022 Strategic Plan Update
- Review 2023 Strategic Plan Approach
- Strategic Planning Process
- Chapter Strategic Planning Toolkit

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Purpose of A Strategic Plan

Focus on mission

Focus on key priorities and strategies

Ensure accountability

Identify possible partners

A mechanism for evaluating its effectiveness in delivering its mission.

Where there is no vision, the people perish: but he that keepeth the law, happy is he. Proverbs 29:18

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2018-2028 Strategic Plan

MEMBERSHIP GOALS

1. Maintain and broaden a strong, unified diverse, respectful and actively-involved membership of distinguished women consistent with the mission to cultivate and encourage high scholastic and ethical standards and promote unity and friendship among collegiate and graduate members of the organization.
2. Implement initiatives that encourage collaborative working relationships among the members and the community at large consistent with the mission to promote unity and friendship and to be of service to all mankind.

SISTERLY RELATIONS & ETHICS GOAL

1. Promote and address the moral and cultural issues of character, respect, high ethical standards and unity of purpose and commitment, as addressed in the Soror Code of Ethics, adopting methods of conflict resolution that allow for disagreements and conflict resolution without undermining sisterhood, sorority principles or operational integrity; provide oversight mechanisms that address major issues and/or problems.

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2018-2028 Strategic Plan

LEADERSHIP DEVELOPMENT GOAL

1. Implement programs, activities and training that empowers members to be leaders within the international organization and in chapters, communities and workplaces consistent with the mission to cultivate and encourage high scholastic and ethical standards and to help alleviate problems concerning women to improve their social stature.

STRUCTURE AND OPERATIONS GOALS

1. Maintain an efficient and effective cooperative governance structure and corresponding office operations in support of an active volunteer membership.
2. Implement and maintain an effective, ongoing process of evaluation of the membership, its needs relative to the mission of the organization, achievement of strategic goals and objectives, and changes necessary to fully meet both.
3. Implement and utilize best practices models from other large non-profit membership organizations, consistent with the applicability to a sisterhood, to ensure that the corporate structure is responsive to the needs of the membership and that the operations meet the highest standards of compliance with all applicable rules, laws, and regulations.

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2018-2028 Strategic Plan

PROGRAMS OF SERVICE GOAL

1. Develop, implement and evaluate impact of program and service initiatives that support the organizational mission.

FINANCE AND SUSTAINABILITY GOALS

1. Provide for the future financial empowerment and long-term organizational viability.
2. Maintain a strong financial base for the organization.
3. Ensure the integrity and oversight of the fiscal operations with clear definitions and monitoring, allowing for an informed membership.
4. Sustain and protect the organization's intangible assets and global image.

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2018-2028 Strategic Plan

COLLABORATIONS AND PARTNERSHIPS GOALS

1. Maintain and expand collaborative relationships and partnerships.
2. Strengthen relationships with National Pan-Hellenic Council (NPHC) organizations.
3. Increase sponsorships to support the organization's mission and programs.

RISK MANAGEMENT GOALS

1. Develop strategies to identify, quantify and manage the risk exposure for the organization. Maintain a risk management plan for the organization that facilitates interface with the sorority's legal team, and insurance professional in order to reduce and minimize risk to protect the organization.

TECHNOLOGY GOAL

1. Establish collaboratively between the Corporate office IT and the International Technology Committee a multi-purpose enterprise **low to no cost** solution made available to all regions and that allows for revisions as changes in administrations/technology occur.

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STRATEGIC PLAN | 2018-2022 Update

Four-Year Progress Report of 2018-2028 Plan

Key Achievements as Identified by International Committees

- **MIP Goals**
 - Designed and created a MIP model that allowed Sorors to vote and invite new candidates into the Sorority.
 - Developed an online MIP request form and virtual training/webinars to support the modified MIPs, held amid a global pandemic.
 - Risk Management Plans/Webinars were rolled out to all Chapters during 2020-2021
 - Reactivation Workplace - resulted in the record-breaking number of active Sorors, including the reactivation of over 30,000 inactive members.

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STRATEGIC PLAN | 2018-2022 Update

Four-Year Progress Report of 2018-2028 Plan

- **Sisterly Relations Goals**

- Implemented a new recognition category - The Pearl Soror - honoring those who have achieved 65 years of membership
- DPGS Virtual Celebrations – a collaboration with Sisterly Relations and Membership
- The AKA Legacy Project to capture and preserve the memories and recollections of our 90+-year-old Diamond and Centenarian sorors through video and audiotaped interviews

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STRATEGIC PLAN | 2018-2022 Update

Four-Year Progress Report of 2018-2028 Plan

- Leadership Development
 - AKA University Modules are great teaching tools.
 - Created leadership development training on the regional level
- Structure and Operations Goals
 - Virtual training workshops on the chapter evaluation process and structure as required for effective chapter operations.
- Programs of Service
 - Wellness Fairs to educate the region's population and increase COVID-19 vaccination rates and education about the vaccine.

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STRATEGIC PLAN | 2018-2022 Update

Four-Year Progress Report of 2018-2028 Plan

- Finance and Sustainability Goals
 - The International Investment Committee - sound investment strategy that safely grew the Sorority's portfolio by over \$3 million.
- Risk Management Goals
 - Risk Management was established as a Standing Committee
- Technology Goals
 - Online MIP support to implement modified MIP Process; online documentation
 - Assisted regions and International Committees with survey administration and developed a technology best practice guide for virtual chapter operations

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STRATEGIC PLAN | 2022-2023 Update

Strategic Planning

- ▶ The committee has started the work of preparing to update the current strategic plan by:
 - ▶ Reviewing the current strategic plan and source documents from past Administrations
 - ▶ Developing a plan to refresh the current strategic plan, which includes stakeholder assessment on the national, regional, and chapter levels; priorities; outcomes; milestones, and measures of success
- ▶ **RECOMMENDATION**
 - ▶ Reduce the timeframe for the strategic plan to five years to ensure its agility to be able to address a changing landscape – Approved at the February 2023 Directorate Meeting

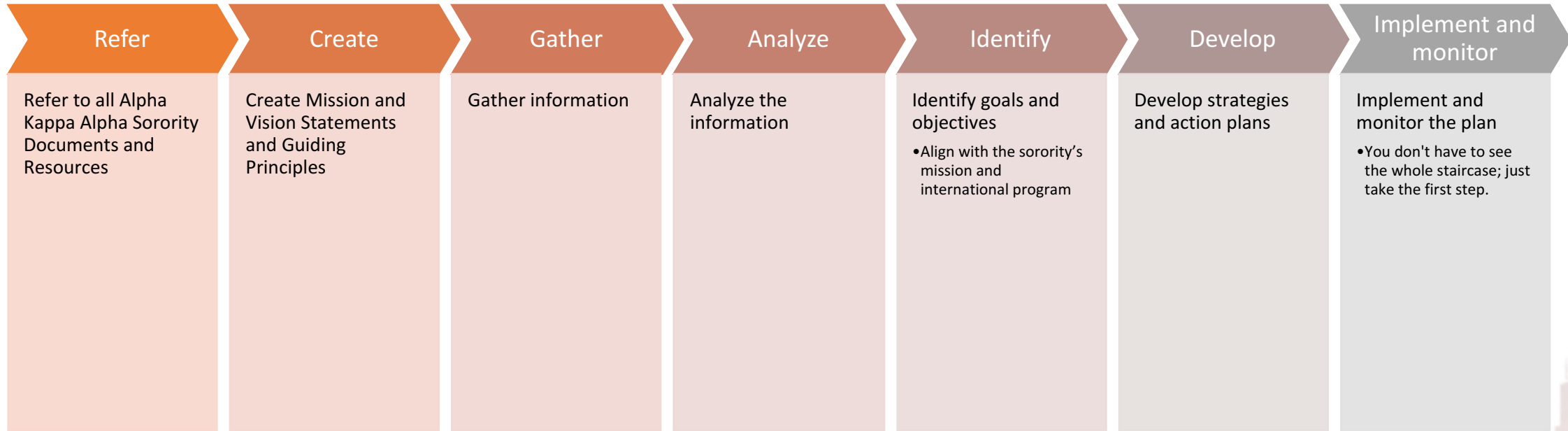
Strategic Partners

- ▶ Utilizing the structure for sponsorship opportunities, the committee has begun to:
 - ▶ Identify key partners to support the Leadership Summit and the 71st Boule
 - ▶ Look at multi-year opportunities to leverage sponsorship opportunities better
 - ▶ Work with the 71st Boule Fund Development Committee Chairs to support their efforts
 - ▶ Identify key partners to support programming efforts

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THE STRATEGIC PLANNING PROCESS



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WRITE THE VISION

2 Then the Lord answered me and said: "Write the vision And make it plain on tablets, That he may run who reads it. 3 The vision is yet for an appointed time, But at the end, it will speak and not lie. Though it tarries, wait for it; Because it will surely come, It will not tarry." Habakkuk 2:2-3

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MISSION AND VISION STATEMENTS GUIDING PRINCIPLES

- **Mission Statement** defines the core purpose and identity of the chapter.
- **Vision statement** outlines its long-term aspirations and desired future state.
- **Guiding Principles** serve as a set of core values and beliefs that inform the development and implementation of a chapter's strategic plan.

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CREATING A MISSION AND VISION STATEMENT

- ▶ Gather Input and Perspectives
- ▶ Understand the Sorority's Values and Principles
- ▶ Define the Mission Statement
- ▶ Craft the Vision Statement
- ▶ Incorporate Key Themes and Values
- ▶ Refine and Finalize
- ▶ Communicate and Implement

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GATHER INFORMATION

- Discuss the importance of gathering information
- Identify the sources of information and how to collect it
 - Member Surveys
 - Exit surveys
 - Survey Alumni (undergraduate chapters)
 - Chapter Leadership (current and former)
 - Alpha Kappa Alpha Sorority, Inc. Strategic Plan and International Programs
 - Other chapters' strategies and practice
 - Market Research
 - Internal Documentation
- SWOT Analysis

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S.W.O.T. ANALYSIS



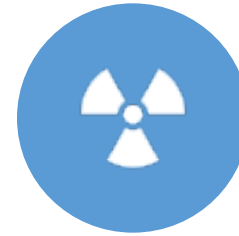
STRENGTHS



WEAKNESSES



OPPORTUNITIES



THREATS



ACTION PLAN

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SAMPLE S.W.O.T. TABLE

	Opportunities	Threats
Strengths	Where <u>Opportunities</u> and <u>Strengths</u> are aligned, we need to	Where <u>Threats</u> and <u>Strengths</u> are aligned, we need to
Weaknesses	Where <u>Opportunities</u> and <u>Weaknesses</u> are aligned, we need to	Where <u>Threats</u> and <u>Weaknesses</u> are aligned, we need to

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ANALYZE THE INFORMATION

How to analyze and interpret the data

- Data Organization
- Data Cleaning and Validation
- Data Analysis
 - Tools and techniques
- Interpretation and Insight

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IDENTIFY GOALS AND OBJECTIVES

- The importance of developing SMART Goals and Objectives
 - Direction and Focus
 - Measurement and Evaluation
 - Resource Allocation
 - Motivation and Engagement
- Align to the Sororities mission (purpose) and programs

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ALPHA KAPPA ALPHA SORORITY, INC. MISSION/PURPOSE

Alpha Kappa Alpha Sorority, Incorporated® was founded on a mission of five basic tenets that have remained unchanged since the sorority's inception.

Our mission 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."

"By Culture and By Merit"

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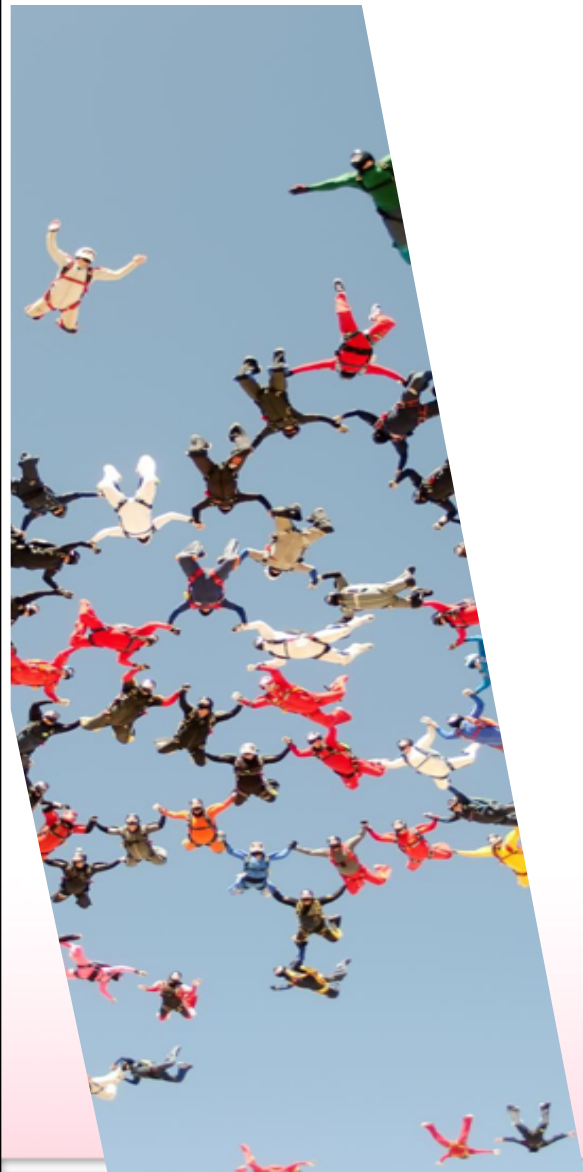
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2022-2026 INITIATIVES – INTERNATIONAL PROGRAM

- This administration has six initiatives. Strengthen Our Sisterhood will serve as the administration’s “Foundation Initiative” as we strengthen our bonds to support our service mission.
- The remaining five initiatives will serve as the “Program Initiatives,” which include:
 - Empower Our Families
 - Build Our Economic Wealth
 - Enhance Our Environment
 - Advocate for Social Justice
 - Uplift Our Local Community

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S.M.A.R.T. GOALS AND OBJECTIVES



SPECIFIC



MEASURABLE



ACHIEVABLE



RELEVANT



TIME-BOUND

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EXAMPLES OF S.M.A.R.T. GOALS AND OBJECTIVES FOR A CHAPTER

1. **Specific:** Increase member engagement in philanthropic activities by organizing at least three community service events per year, involving at least 80% of chapter members.
2. **Measurable:** Achieve a 10% increase in chapter membership within the next year (academic year) through targeted recruitment efforts, resulting in 50 new members.
3. **Achievable (undergraduate):** Attain a chapter-wide GPA of 3.5 or above for the upcoming academic year by implementing academic support programs and providing resources for members' educational success.
4. **Relevant:** Enhance leadership development opportunities by organizing a leadership retreat, inviting guest speakers, and offering workshops on career planning, interviewing, skill-building, and personal growth.
5. **Time-bound:** Establish a mentorship program for new members within the first month of joining the chapter (their initiation), providing each new member with a mentor from the chapter who will support their transition and integration into the sorority.

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DEVELOP STRATEGIES AND ACTION PLANS



IDENTIFY
STRATEGIES



BREAK DOWN
STRATEGIES INTO
ACTION STEPS



ASSIGN
RESPONSIBILITIES



SET TIMELINES



RESOURCE
ALLOCATION

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EXAMPLES OF STRATEGIES

- Tactical Objective - Implement a leadership development program
- Specific Task – Plan a leadership development workshop
 - Invite sorors in leadership positions in the graduate chapter and local regional and national officers to be guest speakers
 - Current leaders can provide mentoring, coaching, and shadowing opportunities for aspiring leaders in the chapter
 - Create a “Day in the Life” of an officer for the weekly (monthly newsletter)
- Responsibility – Leadership Development Committee
- Financial Impact – \$0 (workshops can be virtual or hosted on campus)
- Timeline – ongoing development with targeted efforts starting the spring semester before the fall elections
- Bylaw Impact - None

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EXAMPLES OF STRATEGIES

- Tactical Objective – Academic Support Strategy
- Specific Task – Establish a program to support academic success
 - Encourage sorors to meet weekly in the library for dedicated study time to prioritize academic success and hold each other accountable.
 - Time management workshop at the beginning of the semester
 - Provide best practices for balancing academics and sorority responsibilities
 - Celebrate our academic successes
- Responsibility – All members
- Financial Impact – \$0
- Timeline – ongoing
- Bylaw Impact - None

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EXAMPLES OF STRATEGIES

- Tactical Objective – Member Engagement and Retention Strategy
- Specific Task – Increase member involvement by 25% and retain 85% of the chapter each year.
 - Create a welcome package for new sorors
 - Sign sorors up to serve on one operation and one program committee
 - Include a skills assessment to assist the Basileus in the appointment of new sorors
 - Hold a meet and greet before each chapter meeting
 - Hold a workshop to reacclimate sorors to the sorority
 - Assign a soror to mentor sorors who have been inactive
- Responsibility – Membership Committee
- Financial Impact – \$0
- Timeline – ongoing
- Bylaw Impact - None

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EXAMPLES OF STRATEGIES

- Tactical Objective – Build Strategic Partnerships
- Specific Task – Establish a program to support academic success
 - Conduct an environmental scan to identify potential partners
 - Develop a partnership proposal
 - Establish Contact and Arrange Meetings
 - Present Partnership Opportunities
 - Negotiate Terms and Agreements
 - Implement Partnership Activities
- Responsibility – Strategic Partnerships Committees (or Foundation)
- Financial Impact – Increase revenue
- Timeline –
 - Month 1: Identify Potential Partners and Conduct Research
 - Month 2: Develop Partnership Proposal
 - Month 3: Establish Contact and Arrange Meetings
 - Month 4: Present Partnership Opportunities and Begin Negotiations
 - Month 5: Finalize Partnership Agreements
 - Month 6/Foreword: Implement Partnership Activities and Maintain Ongoing Partnerships
- Bylaw Impact - None

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IMPLEMENT AND MONITOR THE PLAN

Alpha Kappa Alpha Sorority, Incorporated									
CHAPTER STRATEGIC PLAN SELF-EVALUATION TOOL			DOCUMENTATION			COMPLETION STATUS AND DATE			
A			Location of Required Content:			E	F	G	H
Chapter:	Address:		B	C	D	Complete (v)	Incomplete (x)	Pending Further Edit (*)	Planned Completion Date (XX/XX/XXXX)
City:	State:	Zip Code:	Page #(s)	Paragraph #(s)	Line #(s)				
Basileus:	Ph#: ()								
Email Address:									
Mission Statement									
Succinct and concise									
Easy to understand and interpret									
Aligns to Alpha Kappa Alpha purpose, (refer to International Strategic Planning guide)									
Vision Statement									
Succinct and concise									
Easy to understand and interpret									
Is stand-alone - no explanation required									
Inspiring and future-oriented (refer to International Strategic Planning guide)									
Guiding Principles									
Succinct and concise									
Easy to understand and interpret									
Reflects Alpha Kappa Alpha guiding principles									
Clearly identifies Chapter priorities									
Analysis									
Outlines analysis methods (SWOT, survey, etc.)									
Demonstrates appropriate use data-gathering approach or method									
Clearly stated themes derived from analysis									
Provides evidence of outcomes									
Addresses members' needs									
Focus Areas									
Includes top priorities identified									
Includes at least three (3) focus areas									
Reflects voice of membership									
Strategic Goals									
Provides clear direction or way forward									
Does not exceed five (5) goals									
Covers period of 3-5 years									
Ensures goals are S.M.A.R.T. - Strategic, Measurable, Attainable, Relevant, Timely									
Aligns to Alpha Kappa Alpha International Strategic Plan									
Incorporates use of resources (money, time, etc.)									

Alpha Kappa Alpha Sorority, Inc. Chapter Strategic Plan Self-Assessment

Vision without execution is a hallucination.

Thomas Edison

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IMPLEMENT, MONITOR, AND EVALUATE

-  Implement and Evaluate
-  Regular Progress Evaluation
-  Monitor Key Performance Indicators (KPIs)
-  Review and Adjust
-  Engage in Continuous Improvement
-  Celebrate Milestones and Achievements
-  Annual Evaluation and Reflection

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PUTTING IT ALL TOGETHER



Executive Summary



Background and Context



List the Goals



Create a table or put in paragraph form the objectives, and specific tasks, whose responsible, financial impact, timeline and bylaw impact

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EXAMPLE

Membership Goal 1:

Maintain and broaden a strong, unified, diverse, respectful, and actively involved membership of distinguished women consistent with the mission to cultivate and encourage high scholastic and ethical standards and promote unity and friendship among college women.

Tactical Objectives:	Specific Tasks:	Responsibility:	Financial Impact:	Timeline:	Bylaw Impact
A: Broaden and Diversify the Membership Base	1. Encourage members to present or support distinguished women with high ethical standards and exemplary academic achievement who possess qualities that can impact, enhance, and sustain the organization's operation.	Corporate Office, International Membership Committee, Regional Directors, Chapters, Chapter Membership Committees, All Members	Increase Revenue to Organization and chapters.	2018 and ongoing	None
	2. Continue to review the Membership Intake Process (MIP) and the effectiveness of recruiting members with the above qualities.	International Membership Committee, Regional Directors, Chapters, Chapter Membership Committees	Cost of reviewing and revising Sorority Documents	2018 and ongoing	None
	3. Implement surveys or other technology to assist chapters with evaluating the skills, backgrounds, and professional interests needed in the chapter.	International Membership Committee, International Technology Committee, International Standards Committee, Chapter Basilei, Chapter Membership Committees.	Cost of implementing and developing the survey and technology	2018 and ongoing	None

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NEXT STEPS

- **Strategic Planning**

- Begin development of assessment protocol and questions
- Develop a strategic planning toolkit for chapters
- Prepare strategic planning evaluation plan for review

- **Strategic Partners**

- Request partner MOUs from Corporate Office for review and renewal
- Finalize partnership/sponsorship list and solidify agreements
- Finalize Boule fund development opportunities from both national and local sponsors

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STRATEGIC PLANNING TOOLKIT

- General Guidelines for Developing a Strategic Plan
- Detailed guidance for developing each section of the plan
- How-to with examples
- Templates
 - Action Plan
 - S.W.O.T Analysis Template
 - Sample Goal Setting Worksheet
 - Skills Self-Assessment for Chapters
 - Sample Dashboard for Tracking Progress
 - Alpha Kappa Alpha Sorority's Self-Assessment Tool
- Strategies for Managing Large Chapters
- Best Practices and Steps Developing for Strategic Partnerships
 - Sample Event Planning Guide

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Q & A

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Name of Soror: Kimberly Jeffries Leonard, Chairman

Phone: (202) 271-7789

Email: kjeffriesleonard@aka1908.com/kjleonard@kimjl.com

Contact



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Thank You

