



Alpha Kappa Alpha Sorority, Incorporated®

Theta Rho Omega Chapter

**Strategic Plan Matrix
2023-2028**

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Alpha Kappa Alpha Sorority, Incorporated

Theta Rho Omega Chapter

Strategic Planning is a roadmap that allows the organization to examine our strengths, weaknesses, opportunities and risks through a structured approach that begins with defining the mission of the organization. Using the organization's vision statement and guiding principles as a framework, an action plan is developed.

In Theta Rho Omega Chapter, the strategic planning process continues as a disciplined approach to make fundamental decisions and take actions that will shape and guide the chapter in the long term.

Key Components in Developing a Strategic Plan

- ✓ **Mission Statement** - The mission statement is a statement of the organizational purpose.
- ✓ **Vision Statement** – The vision statement is a description of what an organization will look like if it succeeds in implementing its strategies and achieves its full potential.
- ✓ **Guiding Principles** - Guiding principles establish the framework within which an organization will pursue its vision.
- ✓ **Strategic Goals** - Strategic goals are long term organizational targets. They state what the organization plans to accomplish over the next several years.
- ✓ **Action Plans** – The action plan is the guide to achieving strategic goals. It is a plan that includes what the organization is going to do, who is going to do it, and the time frame in which it will be done.
- ✓ **Follow Up** – Follow up is the step that examines whether the organization achieved what it has planned. It measures the organization's success in executing action plans prior to starting the process again.

The Strategic Planning Process

Theta Rho Omega's Chapter's Strategic Planning process began with the overnight chapter retreat planned and facilitated by the Standards Committee. The chapter retreat in August was the perfect opportunity to jumpstart the work on this important initiative.

The Strategic Planning Committee was appointed by the Basileus prior to the August chapter retreat and introduced at that time. The retreat allowed for whole chapter participation and laid a solid foundation for the Strategic Planning Committee to build upon.

An Overview of the Process:

- An introduction and explanation about the Strategic Planning process was presented early during the retreat to provide a basic understanding to build upon during the full day working session.
- Sorors were given the opportunity to review Alpha Kappa Alpha's Strategic Plan during the presentation.
- The Strategic Plan developed for Theta Rho Omega's foundation, was presented and reviewed along with the glossary of key elements and terms.
- Sorors completed both the SWOT and PEST analysis processes in order to examine closely the question of who we are as a chapter. Working in small groups, they drafted the chapter's mission statement. Consensus was then reached in the larger group to agree on the chapter's mission statement.
- Data including census reports and other pertinent demographic information regarding the south suburban communities geographically close to Theta Rho Omega was reviewed by each working group.
- Sorors addressed the questions of who, what, where, when and how to identify the priority goals for the chapter.
- The Strategic Planning Committee followed with a series of meetings for five months after the chapter retreat, to refine the work and fulfill their charge to design a plan that would serve as the chapter's road map for the future.

Included in the committee's recommendations are key individuals (bolded) identified as having primary responsibility for specific tasks referenced in each goal. Also incorporated, are processes to insure that this strategic plan is a living guiding document for the chapter, with appropriate checkpoints to monitor our successful completion of each task and goal.

VISION STATEMENT

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

MISSION STATEMENT

Alpha Kappa Alpha Sorority, Incorporated, Theta Rho Omega Chapter will serve the Chicago South Suburban community by promoting lifelong opportunities in the areas of economic advancement, political and health awareness, and educational excellence.

GUIDING PRINCIPLES

Sisterhood — Our behavior will cultivate an atmosphere in which women are encouraged to achieve their highest goals, hopes and dreams.

Unity — Our performance will foster unity and friendship among people of all races, genders, ages, nationalities, religions, and cultural backgrounds.

High Ethical Standards — Our members and officers will exemplify high ethical standards.

Character — Our activities will strengthen character among members and others.

Respect — Our organization will encourage mutual respect among all members of the human race.

Communication - Our organization will foster an environment of effective communication. High Scholastic Achievement — Our initiatives will promote support and encourage high scholastic achievement.

Leadership — Our activities will advance the training and development of leaders. Education — Our initiatives will advocate lifelong learning for the people we serve.

Health — Our initiatives will enhance family life.

Arts — Our initiatives will sustain the arts.

Technology — Our organization will effectively utilize appropriate technologies to continually improve organizational efficiency.

Economics — Our organization will endorse solid economic practices and economic empowerment.

Chapter Profile and History

Theta Rho Omega Chapter
Chartered November 17, 1968
Markham, Illinois

In 1968 change and movement in housing patterns in the Chicago metropolitan area resulted in the rapid growth of the southern suburbs. As the south suburban community expanded, so did the number of Alpha Kappa Alpha women and their families. Two of those women, Soror Emma Bateman and Soror Josephine Franklin found commuting into the city so intrusive on their families lives, that they collaborated to begin the process of establishing a chapter in their community.

They enlisted the aid of Soror Effie Roe, who had moved from South Bend, Indiana to the area, and Soror Winta Massey Mallory, a classmate of Soror Bakeman's. Soror Roe was of a key resource because while a resident of South Bend, Indiana, she worked with the sorors there to help charter Eta Mu Omega Chapter. Together the four sorors scoured the surrounding communities in search of other interested sorors. Soror Ordie Roberts, Central Regional Director, was contacted and the process formally began.

The chartering date was set to occur before the end of 1968. With sorors helping sorors, the ad hoc group grew to eighteen. The sorors petitioned the Boule for a charter and elected temporary officers. Soror Josephine Franklin was chosen to serve as interim chairperson and Soror Barbara Geaither served as chairperson for the community project.

Soror Geaither wrote and directed a pageant entitled "Born Free". The extravaganza was a tribute to the culture of Black people everywhere. The pageant created a place of renown for the sorors in the hearts and minds of the youth. In addition to the community project, the sorors sponsored two fundraising projects, a Kiddy Party at a local movie theater for children in the community, and a Cards and Games party. The work began during the winter months of 1968 and was completed during the fall of the same year. The day Soror Bakeman walked over to Soror Franklin's home with the idea of forming a new chapter, neither knew what to expect. They nurtured the idea, gaining momentum from the work and love of other sorors, eventually bringing Theta Rho Omega Chapter to her place among the other chapters of our illustrious sisterhood on Sunday, November 17, 1968.

Soror Ordie Roberts was joined by Soror Laretta Naylor Thompson, Supreme Grammateus and Soror Beatrice Murphy, Basileus of Theta Omega Chapter of Chicago, as well as Sorors from Chicago and South Bend, Indiana in chartering the chapter.

Once chartered, Theta Rho Omega held its first election. The first officers elected were: Soror Josephine Franklin as Basileus, Soror Dorothy Bradford as Anti-Basileus and Program Chairman, Soror Amerike Warren as Grammateus, Soror Emma Bakeman as Anti-Grammateus, Soror Joyce Marvel as Epistoleus, Soror Rebecca Ross as Tamiochos, Soror Marie Smith as Ivy Leaf Reporter, and Soror Barbara Geaither as Historian. Theta Rho Omega was on her way.

During Theta Rho Omega's initial years, two key projects were developed which became fixtures for many years: The Annual Scholarship Awards and the Public Program. Other projects initiated during this period were a youth tutoring program, Sickle Cell Anemia Drive, "Meet the Candidates Night", and a youth skating party. Proceeds from the skating party were used to support the NAACP and the Cleveland Job Corps.

In 1970, the chapter initiated their first new members. Theta Rho Omega Chapter members were involved in several noteworthy events and programs during the mid to late seventies. The chapter hosted the 1973 and 1978 Central Regional Conferences, saluted fine arts and Black heritage through theater parties, dances and public programs, and printed their first chapter yearbook in 1974. In addition, the chapter initiated its Community Action Program (CAP). The program involved rendering service at an area nursing home, senior citizen's residence or children's hospital. A very successful project, the Community Action Project became an integral part of the chapter's program and would be expanded to include fundraising and other community service initiatives.

During the beginning years of the 1980's, Theta Rho Omega "blossomed like a rose". The chapter initiated six new members and reactivated eight sorors. The chapter named its first "Honey-Do" of the year, held a workshop luncheon on consumerism and money management, initiated Secret Pal activities and sponsored a reception honoring renowned educator, Marva Collins. During this period, Theta Rho Omega Chapter also became involved in the sorority's connection focus. The chapter joined the South Suburban Chamber of Commerce and distributed information to chapter members on community action activities. A focus on health programs at the Harvey Library included presentations on *Toxic Shock Syndrome*, *Nutrition and Women*, *Blood*

Pressure and Weight, and *Women and Cancer*. As the chapter blazed new trails, they also initiated several first-time activities. Among these activities were a Trans African forum, a Teen's Workshop and "Little Miss AKA Pageant". Several of the chapter's projects have endured the span of time.

Scholarship presentations were publicly presented in 1969 at the fundraising event and the practice has continued until today. An annual Skating Party Fundraiser was started in 1975 to support the public service responsibilities of the chapter and was continued until 1990. The chapter's Little Miss AKA Pageant was first presented in 1985 as part of the "Spring Affair" push for scholarship funds. This event was continued over 10 years.

In 1993, the chapter celebrated its silver anniversary. Year after year at regional conferences, Theta Rho Omega has garnered numerous honors and awards. The chapter is most proud that its name is engraved on the roll of honor for corporate giving ((CIP) which hangs in the sorority's corporate offices in Chicago.

A significant milestone in chapter history included the 35th Anniversary affair, an elegant event attended by the Supreme Basileus, Soror Linda M. White and Soror Barbara A. McKenzie, First Supreme Anti-Basileus and the then State Senator Barack Obama.

The chapter also established and incorporated a 501 (C) (3) non-profit and philanthropic entity, the Josephine Elizabeth Seathon Franklin Foundation, named in honor of the chapter's first Basileus and charter member.

Theta Rho Omega chapter has continued its commitment to service in the south suburbs through numerous significant programs and initiatives. In 1999, the new "Vision Quest Awards" fundraiser was launched to generate funds for the chapter's scholarship program and national program initiatives. This annual fundraiser recognized outstanding community leaders who excelled in our national program areas. Funds from the successful fundraiser events resulted in the chapter awarding over \$250,000 in scholarships since its inception and leaving a significant footprint of service in the South Suburban community. The annual fundraiser was refreshed in 2022 and is now presented as a summer soiree and fall day party.

Theta Rho Omega Chapter Charter Members

Soror Emma Jean Bakeman

Soror Dorothy Jean Bradford

Soror LaRuth Colbert

Soror Helane Elizabeth Davis

Soror Josephine Elizabeth Seaton Franklin

Soror Barbara Geather

Soror Renee Green

Soror Lita Holmes

Soror Linda Johnson

Soror Joyce Marvel

Soror Winta Massey

Soror Christine Poquinette

Soror Effie Roe

Soror Rebecca Ross

Soror Nellie Scott

Soror Marie J. Smith

Soror Amerike Warren

Theta Rho Omega Chapter Chapter Basilei

1968 - 1972	Josephine Elizabeth Seaton Franklin
1973 - 1974	Muriel Brown Walker
1975 - 1976	Dorothy Jean Bradford
1977 - 1978	Helane Elizabeth Davis
1979 - 1980	Emma Jean Bakeman
1981 - 1982	Genrose Harwell
1983 - 1984	Dorothy Jean Bryant
1985 - 1986	Andrea Ruth Harris
1987 - 1988	Jacquelyn Heath Parker
1989 - 1990	Anita L. Harmon
1991 - 1992	Jacqueline James Lewis
1993 - 1994	Alfreda Keith Keller
1995 - 1996	Dorothy Jean Bryant
1997 - 1998	Faye E. Terrell-Perkins
1999 - 2000	Mary Kate Palmore
2001 - 2002	Brenda Kay Boykins - Montgomery
2003 - 2004	Patricia Jones-Banks
2005 - 2006	Loester M. Lewis
2007 - 2008	Vanessa Vavasseur
2009 - 2010	Andrea Sanders
2011 - 2012	Doncella Pamon
2013 - 2014	June Cole Boulware
2015 - 2016	Gloria D. Pleasont
2017 - 2018	Jacqueline Richardson
2019 - 2020	Jacqueline Brown
2021 - 2022	Carla Stewart
2023 - 2024	Shanee Lavesque

**Alpha Kappa Alpha Sorority, Incorporated
Theta Rho Omega Chapter
Strategic Planning
Action Plan**

STRATEGIC GOALS

Membership Goals

- 1: Maintain and broaden a strong, unified, diverse, respectful and actively-involved membership of distinguished women consistent with the mission of Theta Rho Omega Chapter and Alpha Kappa Alpha Sorority, Inc.
- 2: Implement programs, activities and training that empower members to be leaders and increase membership involvement within the chapter, community, workplace and the international organization consistent with the mission to cultivate and encourage high scholastic standards and to help alleviate problems concerning women in order to improve their social stature.
- 3: Increase initiatives that encourage collaborative working relationships among the members, and the community at large consistent with the mission to be of service to all mankind.

Structure and Operations Goal

- 1: Maintain an efficient and effective chapter governance structure and chapter operations that support an active volunteer membership.
- 2: Maintain an effective ongoing chapter evaluation process, its needs relative to the mission of the organization and chapter, achievement of strategic goals and objectives and any changes necessary to fully meet both.

3: Grow, sustain and protect the chapter's local brand and international image.

Finance and Sustainability Goals

1. Provide for the future financial empowerment of the Chapter.
- 2: Provide Funding for program, membership and operations.
- 3: Maintain a strong financial base for the Chapter.
- 4: Sustain and protect the Chapter's local brand and international image.

Programs of Service Goal

Undertake program and service initiatives in support of the mission of the Organization and Chapter.

Membership Goal 1: Maintain and broaden a strong, unified, diverse, respectful and actively-involved membership of distinguished women consistent with the mission of Alpha Kappa Alpha Sorority, Inc. and Theta Rho Omega Chapter.

Objectives	Specific Tasks	Responsibility	Implementation Date(s)	Lead Soror Name(s)	*Status
Objective A: Broaden and Diversify the Membership Base Annually	3. Encourage members to present and/or support distinguished women with high ethical standards who possess qualities that can impact, enhance, and sustain the operation of the Chapter.	Membership Committee, Basileus, and all Members	6/25/21	S. Ivey	b. complete
	2. As needed, implement the Membership Intake Process (MIP) to attain members who have the above qualities.	Membership Committee , Basileus, Anti-Basileus	MIP 9/17/21-10/10/21	S. Ivey	b. complete
	3. Reclaiming former Theta Rho Omega Chapter Sorors	Basileus, Anti-Basileus, All Members	Sistah Fest 2021-2022	S. Ivey	b. complete

***a. In progress**

b. Complete

c. Not addressed

d. Other - explain

Membership Goal 1: Maintain and broaden a strong, unified, diverse, respectful and actively-involved membership of distinguished women consistent with the mission of Alpha Kappa Alpha Sorority, Inc. and Theta Rho Omega Chapter.

Objectives	Specific Tasks:	Responsibility:	Implementation Date (s):	Lead Soror Name (s):	*Status:
Objective B: Annually Activate and Retain the Membership Base Involvement by 80%	1. Continue to encourage inactive members to join the Chapter.	Membership Committee , Basileus, Anti-Basileus, All Members	Newsletters, invitation, casual encounters, etc.	S. Ivey	a. In progress
	2. Develop and provide an orientation program for members who transfer and/or reactivate to the Chapter.	Membership Committee , Basileus, Anti-Basileus		S. Ivey	a. In progress
	3. Plan and execute the New Members Orientation Program at last twice a year.	Membership Committee , Basileus, Anti-Basileus,		S. Ivey	a. In progress
	4. Provide Sisterly Relations activities for all members quarterly.	Membership Committee , Anti-Basileus		S. Ivey	a. In progress
	5. Develop an inactive member database to provide opportunities for participation in functions as appropriate.	Membership Committee , Basileus, Anti-Basileus,		S. Ivey	a. In progress

***a. In progress**

b. Complete

c. Not addressed

d. Other - explain

Membership Goal 1: Maintain and broaden a strong, unified, diverse, respectful and actively-involved membership of distinguished women consistent with the mission of Alpha Kappa Alpha Sorority, Inc. and Theta Rho Omega Chapter.

Objectives:	Specific Task:	Responsibility:	Implementation Date (s):	Lead Soror Name (s)	*Status:
Objective C: Increase and Improve Communication within the Membership	1. Use Emails, Calling Post and maintain the Chapter website to enhance communication.	Technology Committee, Basileus, Membership Committee, Epistoleus, All Members		V. Vavasseur	
	2 Develop and distribute Chapter surveys twice annually to assess member engagement.	Standards Committee		G. Pleasont	

***a. In progress**

b. Complete

c. Not addressed

d. Other - explain

Membership Goal 1: Maintain and broaden a strong, unified, diverse, respectful and actively-involved membership of distinguished women consistent with the mission of Alpha Kappa Alpha Sorority, Inc. and Theta Rho Omega Chapter.

Objectives:	Specific Tasks:	Responsibility:	Implementation Date (s):	Lead Soror Name (s):	*Status
Objective D: Annually Implement programs that empower and encourage members to respect all members' abilities, disabilities, experiences and needs	1. Enhance Chapter website and the use of other technology to address the needs and challenges of all members by providing alternative means of communication to keep members informed and engaged.	Technology Committee, Membership Committee, All Members.	2021-2022 Developed expertise in social media, web presence, and soror electronic communications during pandemic.	V. Vavasseur	b. complete
	2. Create programs designed to retain, increase participation and address the needs of Members.	Membership Committee, Technology Committee, All Members	Annual Sistah Fest, Sisterly activities etc.	S. Ivey	a. ongoing
	3. Continue in Person and Conference Call Meetings (as needed) to assist committee chairmen to facilitate the work of their committees.	Basileus, Anti-Basileus, Committee Chairmen	Virtual zoom meetings begun during worldwide pandemic.	s. Ivey	a. ongoing

***a. In progress**

b. Complete

c. Not addressed

d. Other - explain

Membership Goal 1: Maintain and broaden a strong, unified, diverse, respectful and actively-involved membership of distinguished women consistent with the mission of Alpha Kappa Alpha Sorority, Inc. and Theta Rho Omega Chapter.

Objectives:	Specific Tasks:	Responsibility:	Implementation Date (s):	Lead Soror Name (s):	*Status:
Objective E: Increase Initiatives to Reduce the Generation Gap	1. Continue to involve members of all age groups in leadership positions with Chapter.	Basileus		C. Stewart 2022 S. Levesque 2023-24	b. complete
	2. Develop process such as a "Golden Soror Care Circle" to insure that Sorors remain engaged and cared for as they age.	Golden Soror Liaison Membership Committee, Basileus		E. Walker	

***a. In progress**

b. Complete

c. Not addressed

d. Other - explain

Membership Goal 2: Implement programs, activities and training that empower members to be leaders and increase membership involvement within the chapter, community, workplace and the international organization consistent with the mission to cultivate and encourage high scholastic standards and to help alleviate problems concerning women in order to improve their social stature.

Objectives:	Specific Task:	Responsibility:	Implementation Date (s):	Lead Soror Name (s):	*Status:
Objective A: Create a framework for the merger of all leadership training and development initiatives under the umbrella of the Leadership Committee	1. Plan and facilitate the Annual Chapter Retreat and Officers and Committee Chairmen's Workshops.	Leadership Development Committee, Basileus	9/25/21-Retreat	J. Brown G. Pleasant	a. annual
	2. Establish a resource database of certified or credentialed members who can serve as speakers and trainers according to their expertise and field of training.	Leadership Development Committee, Basileus			
	3. Continue to assess the training needs of the members and establish training tracks to address those needs.	Leadership Development Committee, Basileus			
	4. Develop, provide and facilitate leadership development training for officers, committee chairmen and members to enhance Soror's leadership capacity and support chapter's succession planning efforts.	Leadership Development Committee, Basileus, Standards Committee	Leadership Development Series	Leadership Development Committee	a. annual

***a. In progress**

b. Complete

c. Not addressed

d. Other - explain

Membership Goal 2: Implement programs, activities and training that empower members to be leaders and increase membership involvement within the chapter, community, workplace and the international organization consistent with the mission to cultivate and encourage high scholastic standards and to help alleviate problems concerning women in order to improve their social stature.

Objectives:	Specific Task:	Responsibility:	Implementation Date (s):	Lead Soror Name (s):	*Status:
Objective A: Create a framework for the merger of all leadership training and development initiatives under the umbrella of the Leadership Committee	1. Plan and facilitate the Annual Chapter Retreat and Officers and Committee Chairmen’s Workshops.	Leadership Development Committee, Basileus	9/25/21-Chapter Retreat(virtual) 9/23-24/2022	J. Brown	a. annual
	2. Establish a resource database of certified or credentialed members who can serve as speakers and trainers according to their expertise and field of training.	Leadership Development Committee, Basileus			
	3. Continue to assess the training needs of the members and establish training tracks to address those needs.	Leadership Development Committee, Basileus			
	4. Develop, provide and facilitate leadership development training for officers, committee chairmen and members to enhance Soror’s leadership capacity and support chapter’s succession planning efforts.	Leadership Development Committee, Basileus, Standards Committee	Leadership Development Series 2021-2022	J. Brown Cole- Boulware Vavasseur G. Pleasont	b. completed

***a. In progress**

b. Complete

c. Not addressed

d. Other - explain

Membership Goal 3: Increase initiatives that encourage collaborative working relationships among the members, and the community at large consistent with the mission to be of service to all mankind.

Objectives:	Specific Tasks:	Responsibility:	Implementation Date (s):	Lead Soror Name (s):	*Status:
Objective A: Increase collaboration of activities and programs between the members and members of other chapters	1. Promote and participate in joint chapter activities.	Basileus , Anti-Basileus, All Members		S. Levesque	
	2. Evaluate the use and effectiveness of the collaborations and obtain feedback from members utilizing surveys and other technology.	Program Committee , Standards Committee, Technology Committee		S. Levesque	
Objective B: Increase potential opportunities and continue existing opportunities with other organizations	1. Identify and establish relationships with organizations utilizing best practices that are compatible with the Chapter's mission and vision.	Basileus , Anti-Basileus, All Members		S. Levesque	

*a. In progress

b. Complete

c. Not addressed

d. Other - explain

Membership Goal 4: Sisterly Relations and Ethics. Develop and adopt methods of conflict resolution that allow us to disagree and address our differences without undermining our sisterhood or its principles or the integrity of our operations; promote high ethical standards by providing oversight mechanisms that address major issues and/or problems.

Objective:	Specific Tasks:	Responsibility:	Implementation Date (s):	Lead Soror Name (s):	*Status:
Objective A: Continue to encourage and enhance sisterly relations, increase active involvement, friendship and unity within the membership	1. Utilize varying methods of communication to insure that as many members as possible are engaged in the effort to improve and enhance sisterly relations, promote friendship, and strengthen the unity of the chapter.	Membership Committee , Basileus, Technology Committee	6/26/21 Leadership Development Series (Kiahna Davis presented workshop)	J. Brown	a. annual
Objective B: Comply with the Soror Code of Ethics	1. Continue to inform members about the Soror Code of Ethics through chapter meetings, workshops and retreats.	Standards Committee Basileus, Executive Board		G. Pleasont	
	2. Include the Soror Code of Ethics as part of Chapter leadership development and also provide education through website and other means of communications.	Standards Committee Basileus ,Anti- Basileus, Membership Committee, Leadership Development Committee,		G. Pleasont	

***a. In progress**

b. Complete

c. Not addressed

d. Other - explain

Membership Goal 4: Sisterly Relations and Ethics. Develop and adopt methods of conflict resolution that allow us to disagree and address our differences without undermining our sisterhood or its principles or the integrity of our operations; promote high ethical standards by providing oversight mechanisms that address major issues and/or problems.

Objectives:	Specific Tasks:	Responsibility:	Implementation Date (s):	Lead Soror Name (s):	*Status
Objective C: Continue to comply with the Code of Conduct and the Code of Ethics.	1. Continue to include the Code of Conduct (refer to the Manuel of Standard Procedures) as part of Officers and Committee Chairmen leadership training.	Standards Committee, Basileus, Leadership Development Committee		G. Pleasont	
Objective D: Provide the membership with the Alpha Kappa Alpha Sisterly Reconciliation Process document	1. Educate the membership on the national policy requiring the use of the Alpha Kappa Alpha Arbitration Program, the Alpha Kappa Alpha Mediation tool and the Alpha Kappa Alpha Sisterly Reconciliation Process which includes additional steps to resolve conflicts prior to mediation or arbitration.	Standards Committee, Basileus, Leadership Development Committee, Chapter Officers		G. Pleasont	

***a. In progress**

b. Complete

c. Not addressed

d. Other - explain

Structure Goal 1: Maintain an efficient and effective chapter governance structure and chapter operations that support an active volunteer membership.

Objectives:	Specific Tasks:	Responsibility:	Implementation Dates (s):	Lead Soror Name (s):	*Status:
<p>Objective A:</p> <p>Ensure that members are knowledgeable of the authority and specific responsibilities of all officers and Chapter committees</p>	<p>1. Review on an annual basis information from the Constitution and By Laws, Manual of Standard Procedures, Membership Manuals, International Protocol Manual, Rituals, Chapter Operations Manual, So Now You Are Elected, and all other documents and corporate communications as appropriate to educate and communicate the specific responsibilities of all chapter officers and committees.</p>	<p>Parliamentarian, Officers, Committee Chairmen, Standards Committee</p>	<p>6/5/21 Public Relations Workshop(Virtual)</p>	<p>G. Pleasont</p>	
	<p>2. Conduct Officers and Committee chairmen Training for the chapter. Create process for records and knowledge transfer.</p>	<p>Standards Committee, Basileus, Leadership Training Committee</p>	<p>1/9/21 Officer Training(Virtual)</p>	<p>G. Pleasont</p>	
	<p>3. Distribute to Chapter members roster of all officers, committee chairmen and contact information.</p>	<p>Epistoleus, Basileus</p>		<p>I. Crenshaw</p>	

***a. In progress**

b. Complete

c. Not addressed

d. Other - explain

Structure Goal 1: Maintain an efficient and effective chapter governance structure and chapter operations that support an active volunteer membership.

Objectives:	Specific Tasks:	Responsibility:	Implementation Date (s):	Lead Soror Name (s):	*Status:
<p>Objective B:</p> <p>Set forth to the members their obligations and responsibilities as part of the interactive team for the effective management of the chapter and the execution of Chapter goals</p>	<p>1. Extract and share on regular basis information from the Constitution and By Laws, Manual of Standard Procedures, Membership Manuals, Chapter Operations Manual and other appropriate documents.</p>	<p>Officers, Committee Chairmen, Leadership Training Committee, Technology Committee</p>	<p>Newsletter tips, Leadership Development Series, chapter retreat.</p>	<p>All Officers</p>	<p>b. complete</p>
	<p>2. Share information via chapter meetings, chapter communication mechanisms (email, web site, and chapter newsletters), leadership/development training, chapter retreat, and chapter meetings and in mentorship and new member activities.</p>	<p>Technology Committee, Epistoleus</p>	<p>Weekly activities and information.</p>	<p>Vavaseur</p>	<p>c. complete</p>
	<p>3. Encourage all chapter members to attend Cluster, Regional and International meetings.</p>	<p>Basileus</p>	<p>ongoing</p>	<p>S. Levesque</p>	<p>b. complete</p>

***a. In progress**

b. Complete

c. Not addressed

d. Other - explain

Structure Goal 1: Maintain an efficient and effective chapter governance structure and chapter operations that support an active volunteer membership.

Objectives:	Specific Tasks:	Responsibility:	Implementation Date (s):	Lead Soror Name (s):	*Status
<p>Objective C:</p> <p>Ensure the most effective use of chapter resources by providing financial and human resources sufficient to carry out the mission and implement the Chapter's strategic plan</p> <p>a. In progress b. Complete c. Not Addressed d. Other - explain</p>	<p>1. Conduct an assessment of the chapter operations and procedures.</p>	<p>Chapter Audit Committee, Standards Committee</p>		<p>Committee</p>	
	<p>2. Determine appropriate financial and human resources sufficient to carry out the Chapter's mission and implement the Chapter's strategic plan.</p>	<p>Basileus, Executive Committee, Chapter members</p>		<p>S. Levesque</p>	
	<p>3. Allocate the appropriate human & financial resources to support the Chapter's mission and program initiatives.</p>	<p>Finance Committee & Anti Basileus</p>		<p>Vavasseur</p>	
	<p>4. Identify and adopt the best practices to enhance current and future operations and move the Chapter to the highest level of operational efficiency and effectiveness.</p>	<p>Basileus, Executive Committee</p>		<p>S. Levesque</p>	
	<p>5. Update the Chapter Operations Manual as needed, to insure accurate and current best practices, and procedures are communicated.</p>	<p>Standards Committee</p>		<p>G. Pleasont</p>	

Structure Goal 1: Maintain an efficient and effective chapter governance structure and chapter operations that support an active volunteer membership.

Objectives:	Specific Tasks:	Responsibility:	Implementation Date (s):	Lead Soror Name (s):	*Status:
OBJECTIVE D: Communicate and abide by all mandated International and Chapter protocol processes and procedures for efficient, respectful and ethical execution	1. Have standing protocol committee in place to train and advise	Basileus		S. Lesque	
	2. Conduct regular reviews/training of International and Chapter protocol and courtesies via a) Chapter meeting, b) informational meetings, c) Chapter communication mechanisms – email, Chapter web site, newsletter d) leadership/development training, e) officer workshops, f) Chapter retreats.	Protocol Committee		Cole-Boulware	
	3. Utilize current International Protocol Manual, by laws, Manual of Standard Operating Procedures, Chapter Operations Manual, and Corporate communications as guiding documents.	Committee Chairmen & Chapter Members		All Committee Chairmen	
	4. Insure all chapter documents are up to date and consistent with international directives: chapter operations manual, chapter by laws, chapter courtesy directives, chapter website, Silver and Golden Soror mandates.	Standards Committee By-Law Committee, Technology Committee, Protocol Committee, Hodegos		G. Pleasont	

***a. In progress**

b. Complete

c. Not addressed

d. Other - explain

Structure Goal 2: Maintain an effective ongoing chapter evaluation process, its needs relative to the mission of the organization and chapter, achievement of strategic goals and objectives and any changes necessary to fully meet both.

Objectives:	Specific Tasks:	Responsibility:	Implementation Date (s):	Lead Soror Name (s):	*Status:
OBJECTIVE A: Implement the established mission, vision and goals of the International Program in alignment with Signatures Programs and International Directives	1. Conduct on a regular basis a review of the Chapter's program and activities to insure in alignment with the international program directives.	Basileus & Anti-Basileus, Program Committee		S. Levesque	
	2. Utilize the International Program Resource Guide and other educational or training material that provide information on implementation and adaptation of International program initiatives to meet local needs.	Anti-Basileus, Program Committee		S. Levesque	

***a. In progress**

b. Complete

c. Not addressed

d. Other - explain

Goal 2: Maintain an effective ongoing chapter evaluation process, its needs relative to the mission of the organization and chapter, achievement of strategic goals and objectives and any changes necessary to fully meet both.

Objectives:	Specific Tasks:	Responsibility:	Implementation Date (s):	Lead Soror Name (s):	*Status:
OBJECTIVE B: Implement the Chapter's programs and execute operational procedures in alignment with established operational processes and procedures a. In progress b. Complete c. Not Addressed d. Other - explain	1. Conduct an annual review of the Chapter's operations and procedures to assess and insure in alignment with mandated international procedures and processes.	Basileus, Standards Committee		S. Levesque	
	2. Implement in house survey to evaluate Chapter programs; assess best practices and to maximize operational efficiency. Conduct Chapter evaluation twice a year.	Anti-Basileus, Basileus, Program Committee		S. Levesque	
	3. Conduct evaluations for all leadership training to assess effectiveness and provide inputs for future training.	Leadership Development Committee, Standards Committee		J. Brown	
	4. Implement process to address evaluation feedback and mechanisms for change.	Standards Committee		G. Pleasont	

Goal 3: Grow, sustain and protect the chapter’s local brand and international image.

Objectives:	Specific Tasks:	Responsibility:	Implementation Date (s):	Lead Soror Name (s):	*Status:
Objective A: Ensure that the Chapter has a positive brand image in its service community	1. Create a Chapter public relations packet for community and collaborative organizations that outline chapter’s profile, vision, mission, goals and programs of service.	Basileus, Ivy Leaf Reporter		S. Levesque	
	2. Create a chapter informational packet for new members that includes the sorority code of ethics, chapter operational manual, chapter by laws.	Standards Committee, Membership Committee		G. Pleasont	
	3. Promote Chapter programs, activities in the Ivy Leaf, all press releases, and other Chapter communications mechanisms: web site, Face book and other media.	Ivy Leaf Reporter, Technology Committee		J. Patterson	
	4. Maintain, monitor and update chapter website as needed.	Technology Committee		V. Vavasseur	

a. In progress

b. Complete

c. Not addressed

d. Other - explain

Goal 3: Grow, sustain and protect the chapter’s local brand and international image.

Objectives:	Specific Tasks:	Responsibility:	Implementation Date (s):	Lead Soror Name (s)	*Status
Objective B: Ensure that all Sorors comply with the Soror Code of Conduct and Code of Ethics	1. Include the Soror Code of Ethics as part of Chapter leadership development, Chapter meetings, Chapter new officer workshop, Chapter retreat, and leadership/development training.	Standards Committee		G. Pleasant	
	2. Ensure that all Sorors annually sign off the Soror Code of Conduct and Code of Ethics.	Standards Committee, Chapter Members		G. Pleasant	
Objective C: Organizational intellectual property (trademark and copyright) and sorority and chapter image are protected a. In progress b. Complete c. Not Addressed d. Other - explain	1. Insure that Chapter documents (Chapter Operational Manual, by laws, and web site) are updated as appropriate with any International changes and mandates.	Standards Committee, By-Laws Committee		G. Pleasant	
	2. Educate members on the appropriate usage of all sorority symbols and emblems and monitor all communication media, Chapter correspondence, flyers, etc. to insure appropriateness.	Protocol Committee		Levystein	
	3. Monitor chapter operations on a regular basis to insure in compliance with and support of positive chapter image.	Basileus, Protocol Committee		S. Levesque	
	4. Promote Chapter programs to the public and community served enhancing a positive Chapter brand.	Program Committee, Technology Committee, Ivy Leaf Reporter		S. Ivey	

Finance and Sustainability Goal 1: Provide for the future financial empowerment of the Chapter

Objectives:	Specific Tasks:	Responsibility:	Implementation Date (s):	Lead Soror Name (s):	*Status:
Objective A: Continue and Expand the Development of Substantial Financial Funds	1. Continue annual fundraising initiative(s)	Basileus, Finance Committee, Fundraising Committee, Tamiouchos, and all Members	Each Spring – Pir Summer Soiree	S. Levesque Vavasseur	b. complete
			Each fall – Day Party		
Objective B: Encourage Collaborative Fund Raising Activities Where Feasible	1. Obtain donations from commun partners and businesses.	Basileus, Finance Committee, Fund-raising Committee, All Members		S. Levesque Vavasseur	Not

***a. In progress**

b. Complete

c. Not addressed

d. Other - explain

Finance and Sustainability Goal 1: Provide for the future financial empowerment of the Chapter

Objectives:	Specific Tasks:	Responsibility:	Implementation Date (s):	Lead Soror Name (s):	*Status:
Objective C: Pursue Governmental and Corporate Funding to Support Chapter	1. Implement a training program utilizing members who have experience in grant writing to train other chapter members on the procedures of grant writing.	Basileus, Anti-Basileus, Leadership Committee		S. Levesque	
	2. Obtain listing of grant opportunities and potential partnership agreements.	Basileus, Anti-Basileus, Leadership Committee Chairman		S. Levesque	
	3. Complete grant applications and submit proposal for funding as specified in the Federal Register or as specified by corporate entity or state agency.	Basileus, Anti-Basileus, Finance Committee, Leadership Committee		S. Levesque	
Objective D: Maintain and Promote Chapter Assessments	1. Assess the current financial and programmatic status of Chapter assessments.	Basileus, Anti-Basileus, Finance Committee		S. Levesque Vavasseur	

*a. In progress

b. Complete

c. Not addressed

d. Other - explain

Finance and Sustainability Goal 2: Provide funding for program, membership and operations.

Objectives:	Specific Tasks:	Responsibility:	Implementation Date (s):	Lead Soror Name (s):	*Status:
Objective A: Continue and Expand the Development of Substantial Financial Funds	1. Continue annual fundraising initiative(s) in partnership with the Chapter's non-profit organization, other organizations and/or entities.	Basileus , Finance Committee, All Members.	Virtual fundraiser 5/1-15/2021 Soror assessment due in 9/2022 \$110-no fundraiser	S. Levesque	b. complete
	2. Encourage Chapter members to develop creative ideas of mini-fundraising that will reach a wide audience.	Basileus , Finance Committee, All Members	Pick-A-Day fundraiser 9/2022	S. Levesque	b. complete
	3. Provide dues assistance/subsidies for Golden Sorors who may be on a fixed income and young Sorors who may have limited income.	Basileus , Finance Committee	Addressed financial obligations of Golden, Pearl, Diamond, and sorors 85 and older. Also sorors in the year that they graduated undergrad. See bylaws.	S. Levesque	b. complete

***a. In progress**

b. Complete

c. Not addressed

d. Other - explain

Finance and Sustainability Goal 3: Maintain a strong financial base for the Chapter

Objectives:	Specific Tasks:	Responsibility:	Implementation Date (s):	Lead Soror Name (s):	*Status:
Objective A: Investigate Ways to Reduce Operating Costs and Increase Revenue	1. Continue to provide the most cost efficient liability insurance coverage.	Finance Committee	Annual review	Vavasseur	b. complete
	2. Research the use of umbrella bonding and liability insurance coverage.	Finance Committee	As needed	Vavasseur	b. complete
	3. Annually evaluate potential logistics cost savings for budgeted expenses.	Finance Committee, Logistics Committee	As appropriate to the situation	Vavasseur	a-In progress
	4. Provide reporting to the membership on operating budget and expenses and provide sorority financial training for all members.	Leadership Committee, Finance Committee, Standards Committee	Monthly reports, annual financial training for all members.	Vavasseur	b. complete

*a. In progress

b. Complete

c. Not addressed

d. Other - explain

Finance and Sustainability Goal 3: Maintain a strong financial base for the Chapter

Objectives:	Specific Tasks:	Responsibility:	Implementation Date (s):	Lead Soror Name (s):	*Status:
<p>Objective B:</p> <p>Assure integrity of Operations in Addressing Effective Ways to Reduce Operating Costs and Increase Revenue</p>	<p>1. Assess functions and activities of the Executive Board and the Chapter and provide transparency, as appropriate in reporting to ensure prudent use of chapter funds.</p>	<p>Finance Committee, Basileus</p>	<p>Monthly financial reports of expenditures and income.</p>	<p>Vavasseur</p>	<p>b. complete</p>
	<p>2. Provide semi-annual financial training workshops for program chairmen and standing committee chairmen</p>	<p>Finance Committee, Leadership Committee</p>	<p>Workshops in January and September</p>	<p>Vavasseur</p>	<p>b. complete</p>

***a. In progress**

b. Complete

c. Not addressed

d. Other - explain

Finance and Sustainability Goal 4: Sustain and protect the Chapter’s local brand and international image.

Objectives:	Specific Tasks:	Responsibility:	Implementation Date (s):	Lead Soror Name (s):	*Status:
Objective A: Develop a Comprehensive Marketing and Public Relations Plan for reaching Current and Future Members, Potential Funding Sources and the General Public	1. Update community partners on the success of projects they sponsored through the website and other means.	Ivy Leaf Reporter, Public Relations Committee, Program Committee, Technology Committee		Crenshaw	
	2. Provide regular and periodic releases to newsprint and media features highlighting successful programs and projects.	Ivy Leaf Reporter, Public Relations Committee, Program Committee		Crenshaw	
	3. Send press releases on members’ noteworthy accomplishments.	Ivy Leaf Reporter, Public Relations Committee, Program Committee		Crenshaw	
	4. Develop marketing materials to use in communicating the Chapter’s mission and past activities.	Ivy Leaf Reporter, Program Committee, Technology Committee		Crenshaw	

***a. In progress**

b. Complete

c. Not addressed

d. Other - explain

Finance and Sustainability Goal 4: Sustain and protect the Chapter’s local brand and international image.

Objectives:	Specific Tasks:	Responsibility:	Implementation Date (s):	Lead Soror Name (s):	*Status:
Objective B: Utilize the Technologies Necessary to Effectively Implement the Marketing and Public Relations Plan Using All Appropriate Forms of Print and Electronic Media	1. Invite media to Chapter community service events.	Basileus , Public Relations, Committee Program Committee, Technology		J. Brown	
	2. Provide regular and periodic releases to newsprint and media features highlighting programs and projects.	Public Relations Committee , Program Committee, Technology Committee	Per activity/events	Crenshaw	b. complete
	3. Provide for marketing and public relations sessions and training initiatives.	Basileus , Public Relations Committee, Technology Committee, Leadership Committee	6/5/21 Public Relations workshop	S. Levesque	b. complete

***a. In progress**

b. Complete

c. Not addressed

d. Other - explain

Programs of Service Goal 1: Undertake program and service initiatives in support of the mission of the Organization and Chapter.

Objectives:	Tasks:	Responsibility	Implementation Date (s)	Lead Soror Name (s)	*Status:
Objective A: Align and Implement programs of service yearly	1. Align and implement programs of service that reflect the organization and Chapter's mission and relate to the communities served by the membership.	Basileus, Anti-Basileus , Program Committee, All Members	Monthly activities and programs were presented 2016-2022	S. Levesque	b. complete
	2. Utilize the International Program Resource Guide and other educational training materials that provide information on implementation and adaptation of International program initiatives to local needs.	Basileus, Anti-Basileus , Program Committee, All Members	Excellence and SOAR	S. Levesque	b. Complete
	3. Distribute selected sections of the International Program Resource Guide and other information to the appropriate committee members.	Basileus, Anti-Basileus , Committee Chairmen	During officer workshop 2021, 2022	S. Levesque	b. complete

***a. In progress**

b. Complete

c. Not addressed

d. Other - explain

Programs of Service Goal 1: Undertake program and service initiatives in support of the mission of the Organization and Chapter.

Objectives:	Tasks:	Responsibility:	Implementation Date (s):	Lead Soror Name (s):	*Status:
Objective B: Offer local programs of service yearly	1. Assess community needs by looking at demographics and surveying chapter members to determine what community the Chapter will serve.	Program Committee Basileus, Anti-Basileus,		s. Ivey	
	2. Align program(s) of service that reflect the organization and Chapter's mission and address solutions to problems in the community so that they align with national and global priorities.	Program Committee Basileus, Anti-Basileus,		S. Ivey	
	3. Present the program at Chapter meetings, Officer and Committee Chairmen Training, and Chapter retreats.	Program Committee Basileus, Anti-Basileus, Standards Committee		S. Ivey	
	4. Partner with other chapters and organizations with common interests and goals that align with the mission of the Organization and Chapter.	Program Committee Basileus, Anti-Basileus,		S. Ivey	

*a. In progress

b. Complete

c. Not addressed

d. Other - explain

Programs of Service Goal 1: Undertake program and service initiatives in support of the mission of the

Organization and Chapter.

Objectives:	Tasks:	Responsibility:	Implementation Date (s):	Lead Soror Name (s):	*Status:
Objective C: Assess and evaluate local programs of service	1. Assess the programs of service of the Chapter.	Program Committee Basileus, Anti-Basileus,		S. Ivey	
	2. Determine the most effective use of Chapter resources to ascertain if our goals are being accomplished.	Program Committee Basileus, Anti-Basileus,		S. Ivey	
	3. Evaluate each program and share the documents with the Chapter to make sorors aware of how their events are being received and increase the capacity of sorors to be educated about the impact of their project.	Program Committee Basileus, Anti-Basileus,		S. Ivey	
	4. Submit survey results, write-ups, and pictures to the Historian in an end-of-the-year report.	Program Committee Basileus, Anti-Basileus,		S. Ivey	

***a. In progress**

b. Complete

c. Not addressed

d. Other - explain

GLOSSARY OF STRATEGIC PLANNING TERMS

Action Plan - A detailed description of how the strategic goals will be implemented. A plan for the day-to-day operations for the next year. It includes a prioritized list of proposed projects as well as plans for all projects that have been funded. The action plan should be reviewed and updated annually.

Evaluation - A means of objectively assessing the results of programs, projects or services.

Guiding Principles - The framework within which an organization pursues its vision. Together, all of the guiding principles represent the organization's value system.

Mission Statement - A statement of organizational purpose.

Specific Tasks - Well-defined, finite projects or activities undertaken for the purpose of achieving a specific goal or tactical objective.

Strategic Goal - A long-term organizational target or direction of development. It states what the organization wants to accomplish or become over the next several years. Strategic goals provide the basis for decisions about the nature, scope, and relative priorities, of all projects and activities. Everything the organization does should help it move toward attainment of one or more strategic goals.

Strategic Planning - A disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it. A long-term, future-oriented process of assessment, goal-setting, and decision-making that maps an explicit path between the present and a vision of the future, that relies on careful consideration of an organization's capabilities and environment, and leads to priority-based resource allocation.

Strategy - The means by which an organization intends to accomplish a goal or objective. It summarizes a pattern across policies, programs, projects, actions, decisions, and resource allocations.

SWOT - An acronym for strengths, weakness, opportunities and threats. The SWOT exercise is an analysis and evaluation of the internal conditions and external factors that affect an organization by reviewing the strengths, weaknesses, opportunities and threats facing the

Vision Statement - A description of what an organization will look like if it succeeds in implementing its strategies and achieves its full potential.

