

STRATEGIC PLANNING

PI KAPPA PHI  FACILITATOR GUIDE

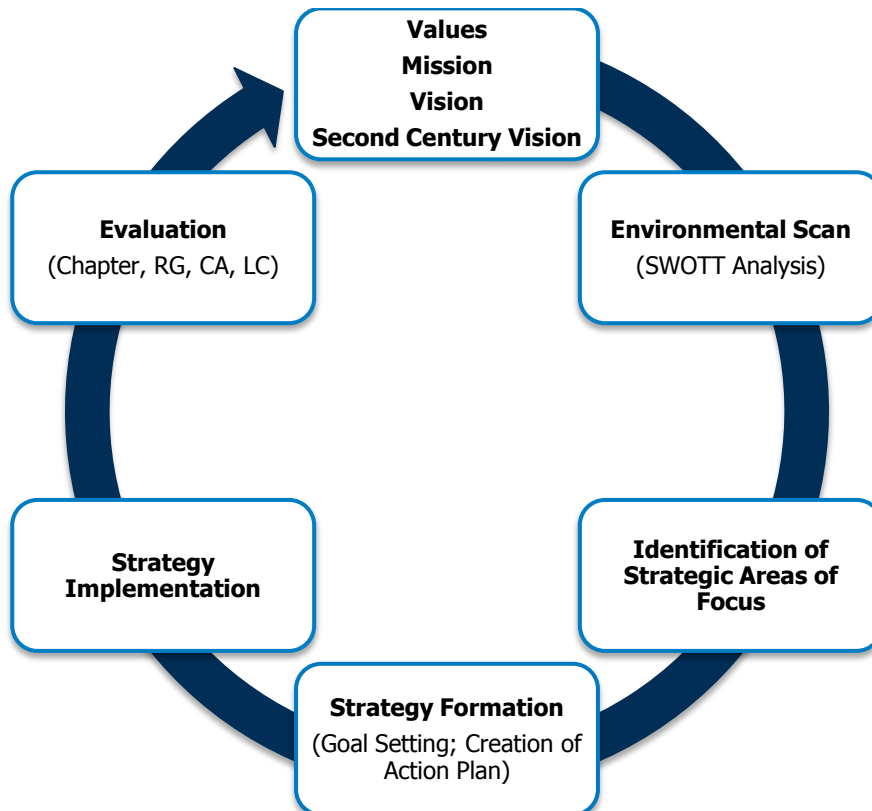
KEY: SECTION (time allotted)

Activity – time allotted

- ✓ Instructions to facilitator
- 🗣️ *Comments to share roughly verbatim*
 - ▶ Other information, details, notes, etc.

BACKGROUND FOR THE FACILITATOR

The Strategic Planning Process



Framework

- ▶ **Values:** Pi Kappa Phi (expressed in the Ritual of Initiation) and Push America (Abilities, Teamwork, Empathy, Integrity)
- ▶ **Mission:** We will lead.
- ▶ **Vision:** Pi Kappa Phi will define fraternity as a lifelong Brotherhood of Leaders.
- ▶ **The Second Century Vision** (<http://www.pikapp.org/downloads/downloads.cfm> → Resources)
- ▶ **The Characteristics of a Healthy Chapter of Pi Kappa Phi** (page 9)
- ▶ *NOTE: The new strategic planning framework does not utilize the Seven Objectives of Chapter Excellence as the basis for developing a chapter strategic plan. Although the national office continues to utilize the Seven Objectives of Chapter Excellence as a metric for evaluating the operational success of undergraduate chapters, the Strategic Planning Workshop is focused on leadership, which requires students to move beyond operational and management-focused issues and think about their undergraduate experience in the context of broader topical areas. Chapters, and specifically members of the Executive Council, should continue to*

utilize the Seven Objectives of Chapter Excellence when examining chapter management, however the new strategic framework should allow chapters to examine issues and explore opportunities for growth outside a traditional checklist-style report.

Facilitation Basics

- ▶ Make things easier
- ▶ Create connections of shared information and experience
- ▶ Help participants get good information and affirmation
- ▶ Provide focus and direction
- ▶ Appropriately challenge and question participants.

Characteristics of an Effective Facilitator

- ▶ Serves as a positive role model for participants
- ▶ Natural and genuine
- ▶ Interested in others
- ▶ Ensures attention is on the participants, not on himself/herself
- ▶ Ensures participants stay engaged and fully participate in each activity and discussion
- ▶ Ensures balanced participation among all participants in small group discussion
- ▶ Allows participants to struggle with issues and does not offer answers
- ▶ Comfortable with silence
- ▶ Does not reminisce or recreate past experiences
- ▶ Uses his/her experiences (but appropriately)
- ▶ Clear and non-judgmental
- ▶ Flexible and able to adapt to different situations
- ▶ Avoids making promises

Effective Facilitation Tools

- ▶ **Communication:** Listening, Questioning, Restating
- ▶ **Observation:** Reading nonverbal cues, Flexibility, Empathy, Timing
- ▶ **Content Depth/Breadth:** Information, Personal experience, Referral skills

WELCOME & INTRODUCTIONS (15 minutes)

- ✓ Facilitators introduce themselves sharing their name, fraternity experience, and professional background
- ✓ Have the participants introduce themselves
- ✓ As a quick ice breaker, have each participant share the most embarrassing song on his iPod (or his "guilty pleasure" song)
- ✓ Facilitators introduce the workshop

🗨️ *Throughout the course of this workshop, we will focus on your chapter's **future**.*

- ☛ *Strategic planning is the process by which you will **envision the future** of your chapter and identify the **areas on which you want the current and future Executive Councils to focus**. This vision helps give the chapter **direction** and the **potential energy** to begin moving.*
- ☛ *Strategic planning is **NOT** an attempt to make future decision today, nor is it an attempt to blueprint the future in a static, unchanging model.*
- ☛ *A strategic plan is kind of like a **game plan**. A game plan **evaluates the current condition** or level of resources and sets a **direction** through a series of uncertainties while also understanding that certain externalities may require you to **adjust** your plan at any given moment.*
- ☛ *Strategic planning requires the chapter to **clearly** identify **core priorities**. Once the chapter has identified and clearly **defined** its core priorities, the Executive Council, chairmen, and committees will utilize these as guideposts in future decision making.*
- ☛ *As the chapter and its officers makes decisions from this point forward, you should ask yourselves: Is this action in line with the chapter's strategic plan? Will it help us move closer to achieving on of our strategic goals? If the answer to these questions is "No," then the chapter should reconsider the action.*
- ☛ *Strategic planning is also a **reiterative process**. Your chapter's strategic plan is a **living document** that is meant to be **guiding**, but also **engaging** (much like the chapter's constitution and bylaws).*
 - ✓ Be sure to answer any questions or clear up any confusion before moving on to the next section

THE FOUNDATION OF PI KAPPA PHI: VALUES (35 minutes)

Purpose of Fraternity – 10 minutes

- ✓ **Materials:** flip chart, marker
- ✓ Generate a discussion around the following questions:
 - ☛ *What is the purpose of fraternities?*
 - ☛ *What is the purpose of Pi Kappa Phi?*
 - ☛ *What are the values of Pi Kappa Phi?*
 - ✓ Record answers
 - ✓ Combine like terms to develop a list of a few key values
 - ✓ Push students to move past basic answers such as "CLASS"
 - ✓ Tie in the values of Push America (Integrity, Abilities, Teamwork, Empathy) in addition to the "standard" values students associate with the fraternity
 - ☛ *Where do we find these values?*
 - ▶ Ritual of Initiation
 - ☛ *What are the principles of Pi Kappa Phi?*
 - ✓ Record answers
 - ☛ *Where do we find these principles?*
 - ▶ Student Creed
 - ☛ *What is the difference between a value and a principle?*
 - ▶ **Value** – an established ideal of life or way of acting that members of a given society regard as desirable (*World Book Dictionary*)
 - ▶ **Principle** – a fundamental belief, a rule of action or conduct
 - ▶ Values are the building blocks of principles, while principles *show how* values are related to one another

Trash Your Values – 10 minutes

- ✓ **Materials:** 5 index cards per participant, paper clips
- ✓ Have participants identify their top 5 values from the handout: Exploring Our Values
- ✓ Have participants transfer their 5 values onto 5 index cards and arrange them in order of importance
- ☛ *Pick up the value that is least important to you and hold it up in the air. Now, rip it up and throw it in the trash.*
 - ✓ Repeat this for the next 3 values
 - ✓ Allow participants to hold on to their last value – make sure it is written bold enough for everyone to see
 - ✓ Have participants paperclip the value to their nametag

Processing Questions:

- ☛ *How did it feel to throw away your values? Do we ever intentionally throw away our values (it's unrealistic to say "No")?*
- ☛ *How did you decide which of your values to throw away 1st, 2nd, 3rd?*
- ☛ *Why do we sometimes decide to throw away our values? If they are what guides our lives, how do we feel when we have trashed them?*
- ☛ *If you had to do this exercise again, would you change anything?*
- ☛ *What have you learned about yourself and your values?*
 - ▶ We need an understanding that values are what guide us and we should cling to them for direction and trust that they have become part of our lives for a reason. At some point, we need to make a conscious decision to not trash our values even if that means following a path that is not easy.

Values Into Action – 15 minutes

- ✓ **Materials:** flip chart, markers
- ✓ Hang 4 signs around the room: STRONGLY AGREE, AGREE, DISAGREE, STRONGLY DISAGREE
- ✓ All participants should be proudly displaying their value
- ✓ The following series of statements should be read and participants asked to make a decision of where they fall in regards to the statement. **No riding the fence. They must take a stand!**
- ☛ *If it is OKAY to get average grades if you're heavily involved on campus.*
- ☛ *It is OKAY to skip the Ritual of Initiation as an initiated member.*
- ☛ *It is OKAY to drink until you pass out.*
- ☛ *It is OKAY to not be involved in a chapter leadership role.*
- ☛ *It is OKAY to pay your chapter dues late as long as you pay them.*
- ☛ *It is OKAY to let a brother smoke pot as long as it's not in the chapter house.*
- ☛ *It is OKAY to wear Pi Kappa Phi letters in a bar.*
- ☛ *It is OKAY to cut someone from rush based on his physical appearance.*
- ☛ *It is OKAY to kick a member out of the chapter for not paying dues.*
- ☛ *It is OKAY to buy alcohol for a friend on his 19th birthday.*
- ☛ *It is OKAY for an Atheist to be a member of your chapter.*
- ☛ *It is OKAY to play some mind games with the new pledges.*
- ☛ *A member's personal actions/behaviors are totally separate from his membership in the chapter.*
 - ✓ Add any others that would make the point

- ✓ After reading each statement and allowing the men to move to a certain area, ask 1-2 at each station the following questions:

- 🗣 *How does your decision to go to your respective area reflect your #1 value?*
- 🗣 *How might your peers react to you making this decision if they saw you wearing your value the way you are now?*

Processing Questions:

- 🗣 *Was this easy or difficult?*
- 🗣 *How did it feel to act on your values?*
- 🗣 *Were you ever in one place then looked at your value and realized you should maybe be somewhere else?*
- 🗣 *How does this relate to your everyday life as a college student and member of Pi Kappa Phi?*
- 🗣 *Do we as Greeks "wear" our values for people to see? How do people know we are Greek?*
- 🗣 *Do we ever find ourselves saying our values are one thing and then doing another? When?*
- 🗣 *Is this a problem? Why?*
- 🗣 *So, why are we discussing values before moving into the meet of a strategic planning workshop?*
 - ▶ Values are the foundation upon which all of Pi Kappa Phi is built.
 - ▶ In order to create a strategic plan that accurately reflects both Pi Kappa Phi's values and the personal values of the members of the chapter, we need to explore our values prior to getting into the specifics of strategic planning.

A LOOK BACK AND A LOOK AHEAD (55 minutes)

Strategic Planning Framework – 5 minutes

- ▶ **Values:** Pi Kappa Phi (expressed in the Ritual of Initiation) and Push America (Abilities, Teamwork, Empathy, Integrity)
- ▶ **Mission:** We will lead.
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- ▶ **The Second Century Vision** (www.pikapp.org)
- ▶ **The Characteristics of a Healthy Chapter of Pi Kappa Phi** (page 7)

Ground Rules – 5 minutes

- 🗣 *We are talking about how you, as a chapter, can be better. We are **NOT** accusing anyone, especially the current officers, of anything.*
 - 🗣 *The remainder of the workshop is about planning for the future of the chapter, not about dwelling on the past. We are going to look at where you are now, but more importantly **where you want to go**.*
 - 🗣 *There will no be any blaming during our discussion. If I hear what sounds like blaming, I will ask you to stop sharing. If you have specific concerns about an individual in the chapter, the best way to handle that is through Ultimate Respect in a one-on-one setting.*
 - 🗣 *Additionally, when you are making observations about where the chapter is or where it needs to go, please use "I" statements.*
 - ▶ Example: "I think the chapter needs to have a greater focus on accountability," rather than, "Everybody knows the chapter needs to have a great focus on accountability."
- ✓ Add any other ground rules the participants thing are necessary

Environmental Scan: SWOTT Analysis – 45 minutes

- ▶ As Dr. Stephen Covey says, you must seek first to understand before being understood. Similarly, the chapter must first understand its current situation (strengths, weaknesses, opportunities, threats, and trends) before the members can identify their strategic focus areas.
- ▶ The most effective way to understand the chapter's current situation is to conduct a SWOTT analysis.
- ✓ Have each participant of the chapter utilize the handout: SWOTT Analysis
- ✓ Participants should individually reflect on each of the areas of a the SWOTT analysis
- ✓ Once participants have reflected individually, use a flip chart or white board to list out the specific points under each heading. The chapter should be able to assemble a lengthy list for each category.
- ✓ Allow students to push back on a given response if they don't think it's true or appropriate to their chapter
 - ▶ **Strengths:** In looking at the chapter's strengths, have participants think about them in relation to both the national organization and their campus community. For example, if all of the fraternities on campus have a high GPA, then a high GPA is not a strength.

Possible Processing Questions:

- 🗣 *What are your advantages as a chapter?*
- 🗣 *What does your chapter do well?*
- 🗣 *What do other people see as your strengths?*

- ▶ **Weaknesses:** What does the chapter not do so well? Consider this from both an internal and external basis. Do others seem to perceive weaknesses that the students do not see?

Possible Processing Questions:

- 🗣 *What could your chapter improve?*
- 🗣 *What do you wish you could do better?*
- 🗣 *What should you avoid?*

- ▶ **Opportunities:** What items/resources does the chapter take advantage of OR what items/resources should the chapter take advantage of and doesn't? Look at the chapter's strengths and ask if these open up any opportunities. Alternatively, look at the chapter's weaknesses and ask whether they could open up opportunities by eliminating them.

Possible Processing Questions:

- 🗣 *What are the good opportunities facing you? Facing your chapter?*
- 🗣 *What are the interesting trends you are aware of?*

- ▶ **Threats:** What should the chapter keep a mindful of in the future? How can the chapter prepare for certain externalities? Consider what threatens the chapter's opportunities from becoming realities.

Possible Processing Questions:

- 🗣 *What obstacles do you face?*
- 🗣 *Could any of your weaknesses seriously threaten your organization?*
- 🗣 *What are other fraternities/sororities doing better than your chapter?*
- 🗣 *Does your chapter disregard university and/or Pi Kappa Phi policies?*
- 🗣 *Does your chapter disregard any federal or state laws?*
- 🗣 *Does your chapter have a low GPA?*

🗨️ *Does your chapter have low membership numbers?*

- ▶ **Trends:** What is going on in the community are you that could impact your chapter (positively or negatively)?

Possible Processing Questions:

- 🗨️ *What are the current trends on campus relating to the Greek community?*
- 🗨️ *What are the current trends within Pi Kappa Phi?*
- 🗨️ *What are the current trends within your college/university?*
- 🗨️ *What are the current trends within the interfraternal community?*

THE SEVEN AREAS OF STRATEGIC FOCUS (55 minutes)

The Characteristics of a Healthy Chapter of Pi Kappa Phi – 20 minutes

- ▶ Adapted from IMPACT Alpha Chi Omega and “Community and Student Life” by Elan Shapiro and Kristin Anundsen from *Charting Your Course: A Life-long Guide to Health and Compassion*
- ✓ **Materials:** flip chart paper, markers, gold stars
- ✓ Lines of The Characteristics of a Healthy Chapter of Pi Kappa Phi should be placed around the room on posters
 - ▶ The chapter cares for all of its members, including the less assertive ones. All feel free to speak from their hearts and reveal their thoughts and feelings. Members are both honest and respectful.
 - ▶ The chapter does not stifle or even just tolerate differences; it welcomes them as a means of expanding its perspective.
 - ▶ Members are aware of, and become involved in, the larger community through service to others and engagement on the campus, in the local community, and on the national level.
 - ▶ While valuing their own sense of identity, members are bound together in a common loyalty and do not devalue or belittle other individuals and communities.
 - ▶ Members are familiar with and appreciate the Ritual as the expression of the Fraternity’s ideals and values. They try to live their lives by these values.
 - ▶ Members remember to celebrate and have fun.
 - ▶ Members share the workload and don’t expect their officers or “someone else” to do everything.
 - ▶ Members feel included in making decisions and setting the direction of the chapter.
 - ▶ Members take pride in the chapter and the national organization.
 - ▶ The chapter offers a balance of opportunities for friendship, leadership, learning, and service.
 - ▶ Members strive to attain the highest possible standards of scholarship.
 - ▶ Members value the importance of personal responsibility and hold each other accountable for failing to meet established standards.
 - ▶ Members are constantly in the process of growing and learning. They create positive experiences by continuing to build better men through their associate member and initiated member education process.
 - ▶ Members recruit others who will continue to bring credit to the fraternity.
 - ▶ Members value the importance of lifelong brotherhood and provide alumni meaningful experiences and opportunities for involvement.

- ✓ Each poster should contain the characteristic, a space of participants to indicate the importance of that characteristic using their stars (see below), and a line on which they can mark the characteristic's presence in the chapter on a 0-10 scale.
- ✓ Each participant is given a strip of 15 stars.
- ✓ Instruct participants to utilize their stars as if they were investing them in that characteristic based on the level of importance to them individually.
- ✓ Also instruct them to place an "X" on the line from 0-10 based on the presence of that characteristic in the chapter.

🗨 *Please place as many or as few stars on the characteristics that have the most significance for you. You may place 14 stars on one and a lone star on another characteristic. Whatever combination for your investment is okay.*

- ✓ Allow 10-15 minutes for participants to place their stars.

Members take pride in their chapter.

IMPORTANCE

PRESENCE IN CHAPTER

0-----10

Determining the Seven Areas of Strategic Focus – 10 minutes

- ✓ Based on the characteristics that have the most stars, select the seven (7) that will become the chapter's Strategic Focus Areas.
- ✓ Ask the chapter if they feel these accurately represent what should become their strategic areas of focus or if different statements should be substituted.
- ✓ If substituting, consider selecting a characteristic the participants felt was less present in the chapter.

Strategic Focus Areas: SWOTT Analysis – 15 minutes

- ✓ Divide the chapter into seven (7) random groups.
- ✓ Give each group one of the Seven Strategic Focus Areas.
- ✓ The group should define the characteristic and perform a SWOTT analysis, identifying the chapter's Strengths, Weaknesses, Opportunities, Threats, and Trends in the area.
- ✓ This is not an opportunity for members of the group to create specific goals for the Strategic Focus Areas. The purpose of the activity is to clearly define strategic areas of focus, so the officers, committee chairmen, and committees can create S.M.A.R.T. goals in each of the areas.

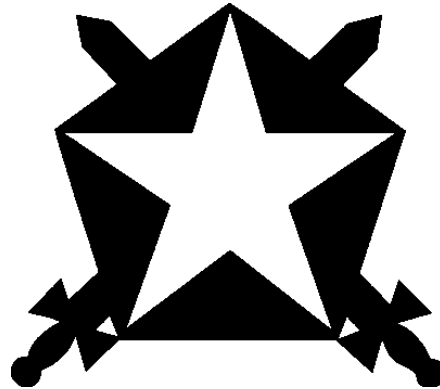
Group Reporting and Consensus Building – 15 minutes

- ✓ Have each group report back the results of their SWOTT analysis.
- ✓ Seek consensus from the members of the chapter that the group has accurately covered all necessary points.

WRAP-UP (5 minutes)

- ✓ Tell the group that the Secretary will type all notes for the entire day and e-mail them out to the chapter for review.
- ✓ The next step is for the officers, committee chairmen, and committees to create goals in each of the seven areas of strategic focus.
- ✓ The Strategic Plan should continue to be discussed as a chapter and adjusted as necessary.
- ✓ Thank them for their participation.

What are your personal values?



Enjoyment
Achievement
Dependability
Creativity
Fairness
Compassion
Family
Leadership
Academics
Faith
Loyalty
Recognition
Accomplishment
Friendship

Intellect
Freedom
Independence
Love
Caring
Responsibility
Equality
Honesty
Service
Power
Growth
Community
Balance
Wisdom

Spirituality
Challenge
Humility
Tolerance
Justice
Dedication
Self-Respect
Respect
Integrity
Individuality
Diversity
Adventure

Specific

Goals must be something that can be described and understood easily by others – finite conditions not general feelings.

Bad Example: Increase participation of members.
Good Example: Increase attendance at chapter meetings.

Measurable

Whenever possible, use numbers or percentages to mark achievement of the goal. You can't rely on personal opinion.

Bad Example: More members will attend...
Good Example: 80% of members will attend chapter meetings.

Attainable

Is the goal realistic? Goals should be a stretch to obtain but not impossible to achieve. Members will work toward what they believe they can achieve and are not inspired by boring, easy goals.

Bad Example: 100% of members will attend every meeting.
Good Example: Increase attendance at chapter meetings by 10% from the prior semester.

Righteous

Is the goal the right thing to do? Goals should be aligned with Pi Kappa Phi's core values and more the chapter toward the core purpose.

Bad Example: Trick as many people as possible into joining, hoping they stick around.
Good Example: Inform potential members of all membership requirements.

Time-Oriented

Goals must have an end date when they are due. Creating a sense of urgency will push members to work harder. How else will you know when to check performance?

Bad Example: Winter
Good Example: January 1, 2010

Sample S.M.A.R.T. Goals

Bad Example: Chapter will get all members to pay dues on time
Good Example: The Treasurer will collect 100% of due by September 30, 2009.

Bad Example: Chapter will get more members involved in service projects.
Good Example: Chapter will conduct two service events by January 1, 2010 with at least 80% of the brothers in attendance.

Things To Do

S.M.A.R.T. Goals:

- 1. _____
- 2. _____
- 3. _____

Action Planning

Strategy	Tasks	Who	When	How