



## **PENNSYLVANIA PHI BETA LAMBDA** **LOCAL CHAPTER STRATEGIC PLANNING GUIDE**

***INSTRUCTIONS: Review the Strategic Planning Presentation, then work with your leadership team and chapter membership to answer the following questions.***

### **STEP 1 & 2: WHERE ARE WE NOW?**

- What are our strengths and weaknesses?*
- How can we build upon our strengths and improve upon our weaknesses?*
- What are our possible future opportunities?*
- How will we take advantage of these opportunities?*
- What are our current and possible future threats?*
- How are we going to be prepared to respond to these threats?*

***This should be a lengthy, detailed process and may require several meetings. The questions below have been developed in case you need help determining strengths and weaknesses. Once you have completed this discussion, proceed to step 3.***

### **STRENGTH AND WEAKNESS IDENTIFICATION:**

***Some specific things to consider may be:***

#### **MEMBERSHIP**

- How many members do we have?
- How has the number of members changed since last year?
  - Why do you think the number increased/decreased/stayed the same since last year?
- What percentage of those members are active?
  - How do we define "active?"
  - Why are so many/so few members active?
  - How do we increase the percentage of active members?
- In general, how do our members feel about our organization?
  - What contributes to these positive feelings?
  - What contributes to these negative feelings?
  - How do we improve upon these negative feelings?
- What percentage of our members are freshmen?
  - How do we attract more freshmen?
  - How do we retain these freshmen?

What specifically do freshmen want out of a business organization?  
How good are we at providing this?  
What can we do to better provide this?

What percentage of our members are sophomores?  
How do we attract more sophomores?  
How do we retain these sophomores?  
What specifically do sophomores want out of a business organization?  
How good are we at providing this?  
What can we do to better provide this?

What percentage of our members are juniors?  
How do we attract more juniors?  
How do we retain these juniors?  
What specifically do juniors want out of a business organization?  
How good are we at providing this?  
What can we do to better provide this?

What percentage of our members are seniors?  
How do we attract more seniors?  
What do seniors want out of a business organization?  
How good are we at providing this?  
What can we do to better provide this?  
How do we keep seniors involved throughout their last year of school?  
How do we help prepare our seniors for life after graduation?  
How do utilize our seniors' experience and expertise to help develop younger members?

Do we have enough members from each academic class to avoid fluctuations in membership numbers over the next 4 years?

What do our members get out of being members of PBL?

Do we communicate often with our chapter alumni?

How can we increase communication with our alumni?

## MEETINGS

How often do we meet?  
Is this too often? Not often enough?

In general, how long are our meetings?  
Is this too long? Not long enough?  
What can we do to shorten/lengthen our meetings?

In general, how organized are our meetings?  
What can we do to make our meetings better organized?

What do we get accomplished at our meetings?  
How can we accomplish more at our meetings?

In general, what percentage of our organization attends our meetings?  
Why do so many/so few people attend our meetings?  
Are our meeting times convenient for our members?  
How can we maintain/increase attendance at our meetings?

## FUNDRAISING

How many fundraisers did we execute last semester/year?

How much money did we raise last year for our organization?

## PROFESSIONAL DEVELOPMENT

How many professional development events did we execute last semester/last year?

What types of skills did these events develop?

How good are we at developing soft skills (time management, interviewing skills, networking skills, resume development, weighing job offers, etc.)?

How can we improve the development of our membership's soft skills?

Are we adequately developing technical skills? (Case study analysis, investing strategy, analyzing financial statements, marketing strategy, current events awareness, etc.)

How can we improve the development of our membership's technical skills?

Are we developing skills relevant to all membership ages?

What sorts of skills do we need to focus more on?

What industries are our members interested in learning about?

Are we organizing professional development events that address these industries?

Do our events adequately prepare our members for careers in those industries?

Do we make it easier for our members to get good internships and jobs?

How can we make it easier for our memberships to get good internships and jobs?

## SERVICE

How many service events did we execute last year?

How successful were they?

Why?

How can we make them more successful?

Do we participate in State/National PBL service programs, such as the March of Dimes and Habitat for Humanity?

How much money did we raise for charity last year?

## PUBLIC RELATIONS

Does the school know about the great things our chapter is doing?

How can we communicate better with the students, faculty, and staff of our school so that they are more aware of what our chapter does?

Does the community know about the great things our chapter is doing?

How can we communicate better with the community so that they are more aware of what our chapter does?

Do PA PBL and National PBL know about the great things our chapter is doing?

How can we communicate better with PA PBL and National PBL so that they are more aware of what our chapter is doing?

Do we regularly submit articles to the E-news?

Do we regularly submit articles to the National publications?

### STATE/NATIONAL INVOLVEMENT

Does our chapter attend the SFOO's?

Does our chapter attend the SLC?

How do our members perform at the SLC?

How can we improve our members' performance at the SLC?

How can we get more members to attend the SLC?

Does our chapter attend the NLC?

How do our members perform at the NLC?

How can we improve our members' performance at the NLC?

How can we get more members to attend the NLC?

How often do we communicate with the PA PBL officers?

Do we nominate members for the Who's Who award?

Do we nominate an outstanding businessperson?

Do we participate in the Outstanding Chapter Challenge?

How can we improve our OCC performance?

How can we increase our members' interest in running for State and National office?

### GENERAL

What is our specific, local chapter vision?

How effective are we in meeting that vision?

What can we do to better achieve our mission?

Do our chapter bylaws reflect our current operations and processes?

### STEP 3: WHERE ARE WE GOING? GOAL SETTING

***Now, use what you have learned from answering the above questions to formulate 10-12 goals that you will actively pursue over the next year. Assign certain people to monitor and organize the efforts in meeting those goals. Choose 2-3 dates to meet to monitor the progress of these goals.***

Goals should be:

SPECIFIC (not "get in shape" but instead "join a health club")

MEASURABLE (use dates, percentages, and other numerical indicators as much as possible)

ATTAINABLE (formulate goals that are challenging, but yet achievable given the current state of your organization)

REALISTIC (set goals that you are willing and able to achieve, given limited resources)

TIME-ORIENTED (set dates by which the goals will be met)