



# CATALYST 2022

STRATEGIC PLAN 2017-2022



PHI THETA KAPPA  
HONOR SOCIETY



PHI THETA KAPPA MISSION

The mission of Phi Theta Kappa is to recognize academic achievement of college students and to provide opportunities for them to grow as scholars and leaders.

PHI THETA KAPPA VISION

Phi Theta Kappa’s vision is to make the benefits of membership accessible to all deserving college students.

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Since its humble beginnings on the campus of Stephens College in Missouri nearly a century ago, with just six members, Phi Theta Kappa has grown to 1,285 chapters on college campuses in all 50 of the United States and around the world. More than 3.2 million students have been inducted since 1918, with approximately 130,000 students inducted annually, making Phi Theta Kappa a true catalyst among members and colleges.

Throughout its history, Phi Theta Kappa has held true to its mission of opening doors for community college students. Through recognition, innovative programming, scholarship and fellowship, Phi Theta Kappa has changed lives. As we move closer to the milestone of celebrating a century, it is time to reflect on the work we have done, the work we are currently doing and the work we need to do to remain relevant and meaningful within the higher education landscape.

We have spent the past year conducting an in-depth environmental scan of the issues facing community colleges and have determined their anticipated impact on the Society. Additionally, we have spent significant time engaged in meaningful conversations with our constituents — community college presidents, advisors, current members, alumni and staff — in an effort to identify how we can better fulfill the mission of the Society. The result is Catalyst 2022.

This research-based, five-year plan represents practical, operational strategies designed to strengthen Phi Theta Kappa at all levels — beginning with the member experience and extending to the chapter and regional levels. This plan is further designed to bolster our relationships with community colleges, as we align our priorities with theirs in an effort to support student success in communities and on community college campuses throughout the world.

Although much good work has already been done, Phi Theta Kappa is truly in its infancy in its ability to transform the lives of its members. This plan will guide us, as we work to sharpen the delivery of our mission and continue to be a catalyst for the members we serve.

**Lynn Tincher-Ladner, Ph.D.**  
President and CEO  
Phi Theta Kappa Honor Society



## STUDENT CHALLENGES



## TRANSFER AND WORKFORCE PREPARATION



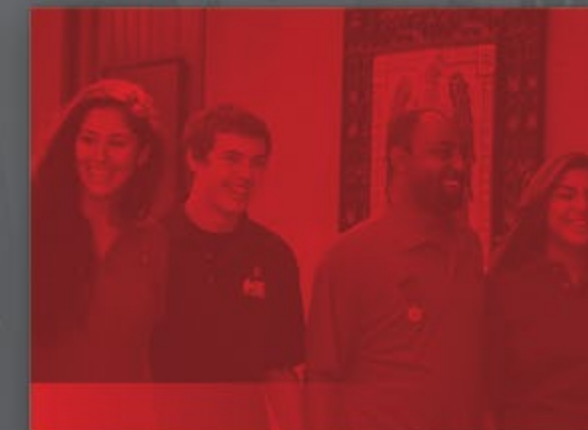
## CHAPTERS AND REGIONS



## COMMUNICATIONS



## ENROLLMENT AND MEMBERSHIP TRENDS



## ALUMNI CHAPTERS AND ENGAGEMENT





## ENVIRONMENTAL ANALYSIS

# STUDENT CHALLENGES

Despite the lower cost of community college, federal Pell Grant support for community college students is critical, specifically because many community college students are low income. When Pell Grants were originally established, they covered a much higher percentage of tuition, leaving students with some amount of cushion to cover the other costs associated with being a student — things like childcare, housing, transportation and food.

Today, the cost of education has risen so much that the opposite is in effect, leaving many students unable to cover the cost of community college tuition, much less the cost of living. Today, the maximum Pell Grant covers only 52% of the total cost of attendance.

## ENVIRONMENTAL ANALYSIS

## STUDENT CHALLENGES

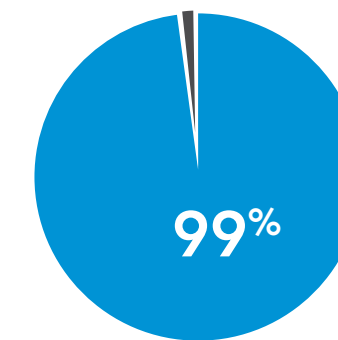
Since the early 2000s, community colleges have faced significant declines in state-supported funding of community colleges. While there has been a flurry of philanthropy and community leaders involved in solving funding issues, these efforts have been highly localized. Policy makers, in general, have chosen to not raise taxes to meet the funding needs of our colleges; as a result, the budget shortfalls have been passed along to the people most in need — the students.

Since 2000, the median tuition at public two-year colleges has increased 142%, and during that same time, Society membership fees have increased 57%. These access challenges have been reflected both in community college enrollment declines and in those joining Phi Theta Kappa. Wages and student financial aid subsidies have not kept pace with these and other increases.

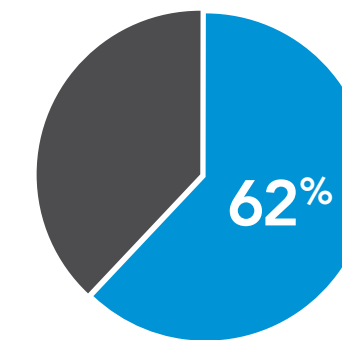
The unmet need of low-income students is a very real crisis — creating almost impossible barriers. Among these issues are homelessness and food insecurity. Over half of all community college students face some level of food insecurity, and nearly 13% experience some form of homelessness while a community college student. For these students, becoming a member of Phi Theta Kappa is financially out of reach.

Low-income community college students face the additional barrier of student engagement. It is widely accepted that there is a connection between student engagement and favorable educational outcomes; however, low-income students, who are required to work to make ends meet, have less time to connect with peers and professors and to take part in social and academic activities that encourage student success like Phi Theta Kappa.

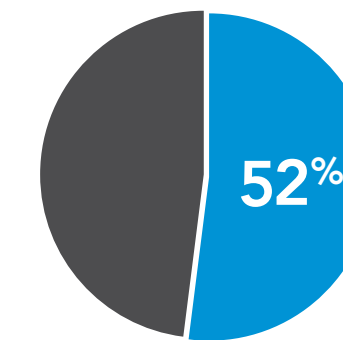
Percent of Total Community College Attendance Covered by Pell Grants



1979-80



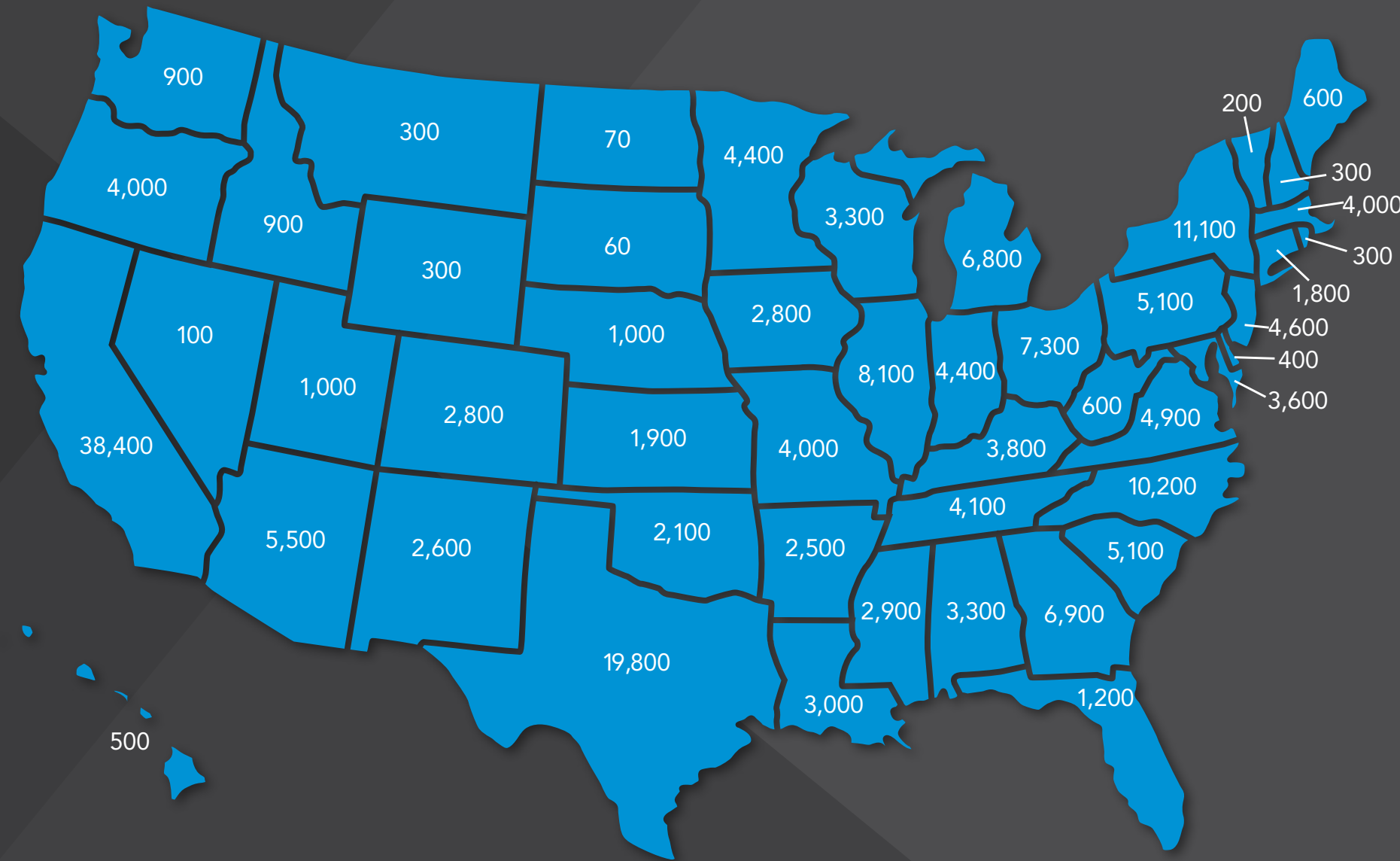
2010-11



2013-14

# Numbers of High-Achieving, Low-Income Students Unable to Join Phi Theta Kappa Due to Membership Costs

Based on community college Pell Grant recipients with GPAs greater than 3.5 (NCES and Phi Theta Kappa data sources)



## PTK FOCUS GROUP HIGHLIGHTS



### TRUTH

Focus groups across all constituents — college presidents, advisors, regional coordinators and students — stressed the importance of keeping membership fees as low as possible.



### TREND

A rising number of colleges are using fundraising and foundation efforts to subsidize membership fees for deserving students who cannot afford membership.



### NEW IDEA

Advisors and colleges need a robust way to easily discount the costs of membership.

## PTK DATA POINTS



**Financial barriers** to membership are the primary reason students do not accept membership.



**Nearly 300 chapters** have no type of budget support from their college administration.



Using Pell recipients as a proxy, an estimated **200,000 low-income students** are eligible annually to join Phi Theta Kappa but cannot afford to accept membership.





## ENVIRONMENTAL ANALYSIS

# TRANSFER AND WORKFORCE PREPARATION

Phi Theta Kappa is well-known for its work in transfer preparedness, an important part of the community college mission. For the past 46 years, Phi Theta Kappa has advocated for transfer scholarships from public and private four-year colleges and universities. Through CollegeFish, members have access to over \$37 million in transfer scholarships annually from over 750 four-year partners. The development of CollegeFish represents a significant financial investment in the student exploration of transfer. In partnership with the Gates Foundation, Phi Theta Kappa invested more than \$5 million to create the transfer scholarship database for our members.

## ENVIRONMENTAL ANALYSIS

## TRANSFER AND WORKFORCE PREPARATION

Scholarships provided directly through the Phi Theta Kappa Foundation's fundraising efforts are largely geared toward members pursuing a bachelor's degree. Even game-changing transfer scholarships such as the Jack Kent Cooke Foundation (JKCF) Community College Transfer Scholarship are, by and large, sought after and won by Phi Theta Kappa members — in recent years, more than 88% of JKCF scholars have been Phi Theta Kappa members. As a result, the Society has come to be known as the center of transfer scholarship opportunities for high-achieving community college students within the United States.

Pathways to bachelor's degree completion have been a priority of the Society for a very long time and should continue to be so; however, Phi Theta Kappa must also determine its role in equipping members with resources and skills needed to transition directly into the workforce. While the Society offers professional development for employment (soft skills) training, it provides very few financial subsidies for students who plan to enter the workforce immediately following community college. Because our focus and benefits have been largely focused on transfer students, Phi Theta Kappa has failed to attract the largest portion of the nation's community college students.

Our nation's community colleges produce three times more associate degrees and certificates to prepare students for jobs in the workforce than degrees designed for transfer. Phi Theta Kappa's membership is the opposite of that, with only one in four members headed directly into the workforce after community college. The percentage of career-ready degrees is likely to continue to increase over the coming years.

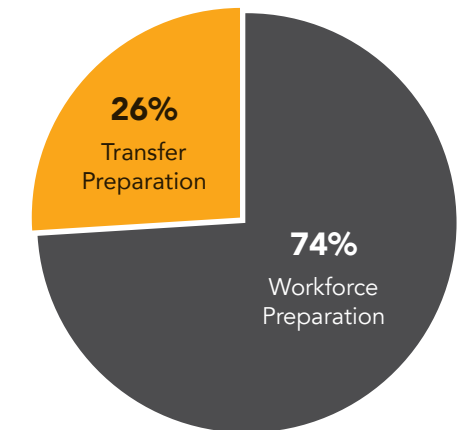
By 2020, it is estimated that 65% of all jobs in the economy will require a post-secondary degree or training. At current rates of degree completion, the United States will be short 5 million qualified workers in fields including healthcare, community services and STEM. Of those, the most difficult jobs to fill will be those of skilled trade workers — programs that only exist in community colleges. The nation is calling upon community colleges to focus on degree completion in those programs that lead students directly to work. Phi Theta Kappa must also respond to this growing need by finding ways to provide these students with member benefits equivalent to those available to our transfer-bound students.

“70% of the time, the costs of industry certification exams are passed directly on to the student.”

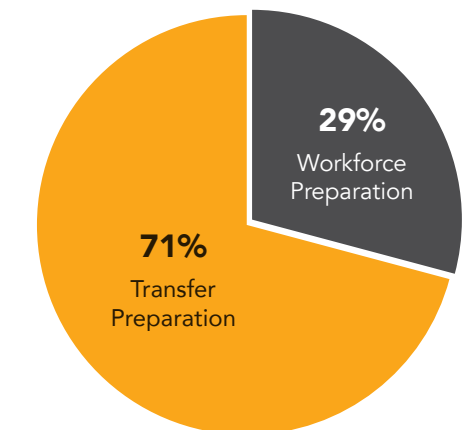
— Lumina Foundation

*Report on Embedding Industry and Professional  
Certifications within Higher Education*

### Community College Degree and Certificate Production



### Phi Theta Kappa Membership by Degree Type





## PTK FOCUS GROUP HIGHLIGHTS



## TRUTH

There will be an increased emphasis on career and technical education in the community college sector. College presidents believe that Phi Theta Kappa should respond to this and, like the schools they serve, have deeper partnerships with business and industry.



## TREND

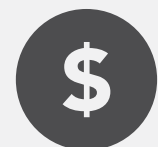
Students want more scholarships and benefits available to them while they are enrolled at the community college. College presidents want Phi Theta Kappa to value career and technical students as much as transfer students.



## NEW IDEA

College presidents are considering other honor societies on campus to provide more focused benefits for career and technical students.

## PTK DATA POINTS



**Only \$250,000 in scholarship money** is available from Phi Theta Kappa to students while enrolled exclusively at the associate-degree level.



**Three out of every four** members transfer to a four-year college or university.

## Top 5 Majors Among Phi Theta Kappa Members



Nursing

Liberal Arts –  
General Education

Business



Education



Social Sciences

## ENVIRONMENTAL ANALYSIS

CHAPTERS AND  
REGIONS

Phi Theta Kappa exists on nearly every community college campus in the United States. The success and growth of Phi Theta Kappa for the past century has resulted in the largest and strongest student organization in higher education — with a 92% success rate among its members. There are over 1,200 dissertation studies on Phi Theta Kappa — definitively pointing to the added value of Phi Theta Kappa to student success.

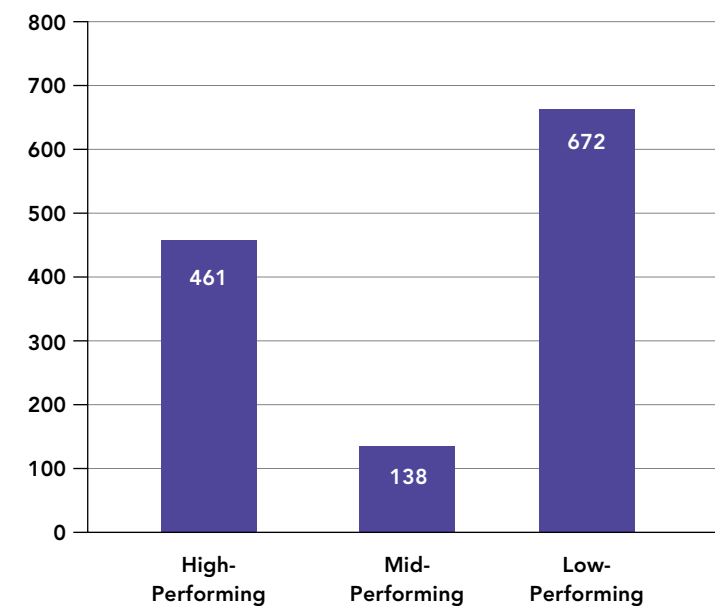
But like many organizations, chapters have a great deal of variability in their success. While some chapters, year after year, flourish in the areas of membership and programming, others do not. Research has identified three primary factors contributing to chapter success:

- **Advisor Engagement** – The average length of service for a Phi Theta Kappa advisor is three years. While there is a great deal of variation with many having served much longer, we often lose new advisors just as they are beginning to understand the role.
- **Administrative Support** – Chapters that do not receive financial support from their colleges are statistically less likely to successfully engage in Society programming. Lack of financial support makes it difficult for students to concentrate on the Society's co-curriculum learning programs, and chapters spend a great deal of time on fundraising activities.
- **Regional Engagement** – Similar to the chapters they serve, the Society's 29 regions also vary greatly in their regional programming efforts. Our studies show that strong and comprehensive regional events and programs have a positive impact on advisor, student and chapter success. Providing a consistent and quality student experience at the regional level is vital to the success of the Phi Theta Kappa mission.

Based on achievement rankings of Phi Theta Kappa chapters, 36% of chapters are considered high-performing, 11% are considered mid-performing and 46% are considered low-performing. Even though the Society has rigorous standards for chapters, these trends should be in reverse.

For the past year, the Society has made initial steps to strengthen our regions by providing financial support for regional programming, website development and events. A regional leadership summit was held in Jackson during the fall of 2016 to gain valuable insight for the strategic plan, review Hallmark award structure and discuss improvements to Convention.

Counts of Chapters by Performance Levels



Based on Five Star Chapter Plan ratings from 2015.  
Low-Performing = 0-1 Star Levels; Mid-Performing = 2-3 Star Levels;  
and High-Performing = 4-5 Star Levels.

“Being a new advisor, Honors in Action is still sort of a mystery to me. I assume this is due to a lack of experience, but I hope to have additional training this year at the Convention. Honors in Action is definitely a hurdle my chapter has yet to overcome.”

— Phi Theta Kappa Chapter Advisor

### PTK FOCUS GROUP HIGHLIGHTS



#### TRUTH

Advisors and students find a great deal of value added by participating in Society programs; however, students and advisors want more guidance and education for their project preparation. Chapters also want more feedback on how to make improvements for the next year.



#### TREND

New advisors struggle for two to almost three years before they fully understand how to facilitate chapter success — particularly with Society programming.



#### NEW IDEA

Administrative awards should be modified to provide more ongoing recognition of college presidents and other administrators who are continuously supportive of the Society. Recognition of college trustees was also recommended.

### PTK DATA POINT



Nearly all low-performing chapters fail to be engaged on the college level, and almost none attend annual events.

“We believe both the Honors in Action project and College Project are important and valuable projects to complete with students when the chapter is active. We are working on reviving our chapter, but it will take several years.”

— Phi Theta Kappa Chapter Advisor





ENVIRONMENTAL ANALYSIS

COMMUNICATIONS

The general landscape of communications with students at community colleges is complex and uneven. Some schools rely heavily on school-issued email addresses, others do not. Some schools leverage social media, others use text messages, and some make important announcements available within their learning management systems. Third-party communications are even more challenging as many colleges have sophisticated SPAM filters that may block incoming communications from outside organizations. Additionally, FERPA protections of student information make it virtually impossible to use targeted messaging to students without the assistance of the colleges themselves, which are FERPA exempt.

ENVIRONMENTAL ANALYSIS

COMMUNICATIONS

In some cases students may not receive membership invitations, and advisors may not be receiving information about important deadlines and announcements. Subsequent communications to members could also be compromised as colleges are continuously changing their technology infrastructures that may accidentally exclude Phi Theta Kappa emails. The Society's heavy reliance on email is becoming increasingly problematic. Email open rates for higher education are low — only 17% with an 8% bounce-back rate.

All constituent groups — staff, alumni, members, presidents and advisors — identified communications as a major weakness of the Society. This is further confirmed by low rates of membership acceptance and low email-open rates among constituents. Over the past year, the Society has worked to address these communication barriers through several initiatives. A mobile-responsive website was introduced, and information about Phi Theta Kappa, including the ability to accept membership, are now available on all mobile devices. The Reach news blog was launched as a first step to evolving Phi Theta Kappa away from its extremely low open-rate e-newsletter communication.

This past year, Phi Theta Kappa has worked to improve its social media presence. We have also learned that members, advisors and presidents prefer different types of social media channels. Younger members prefer Instagram and SnapChat, while advisors and non-traditional students prefer Facebook, and presidents prefer Twitter.

Over the past year, we have strengthened communications with college presidents by creating the Presidential Advisory Board, a 35-member board to assist in communicating Society priorities within their respective states. Beginning in 2014, chapter report cards provide assessment metrics at the state, regional and international levels so presidents and advisors can compare the progress of their chapter to others. While these efforts and others have helped improve communications, there is a significant amount of work to be done and especially with educating new presidents, advisors and members.

PTK FOCUS GROUP HIGHLIGHTS



TRUTH

Members want a phone application with prescriptive functionality to search for scholarships and other features.



TREND

Alumni are concerned with the lack of communication, and there is no information specific to alumni on the Society website.

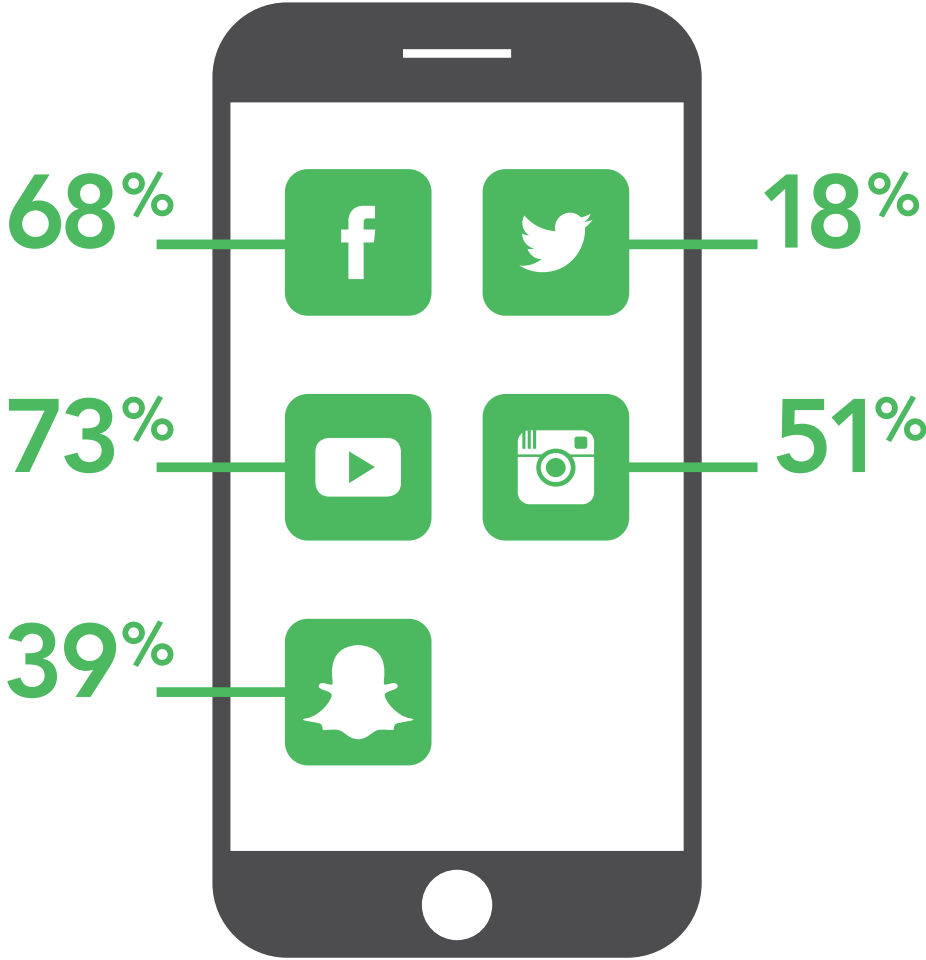


NEW IDEA

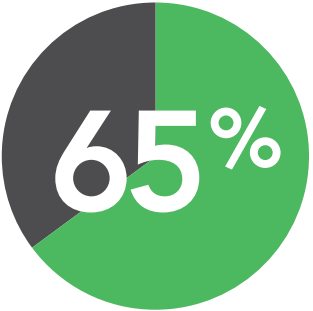
President focus groups reported their marketing departments would assist in awareness and recruitment efforts if tools were provided by Phi Theta Kappa.



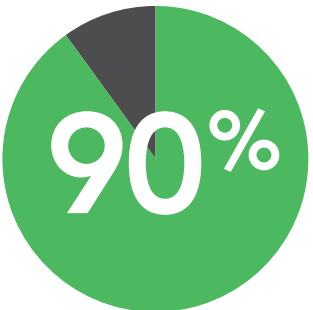
Phi Theta Kappa Members Social Media Presence



Website Usage



**of members** use the website as the main communication to learn about Phi Theta Kappa benefits, events and programs



**of advisors** use the website as the main communication to learn about Phi Theta Kappa benefits, events and programs

ENVIRONMENTAL ANALYSIS

ENROLLMENT AND MEMBERSHIP TRENDS

In the fall of 2010, United States community college enrollment hit an all-time high; but over the past five years, enrollment has declined by 11%. During the same timeframe, Phi Theta Kappa membership declined by 5%. This is in line with what we know historically — that membership trends mirror enrollment trends.

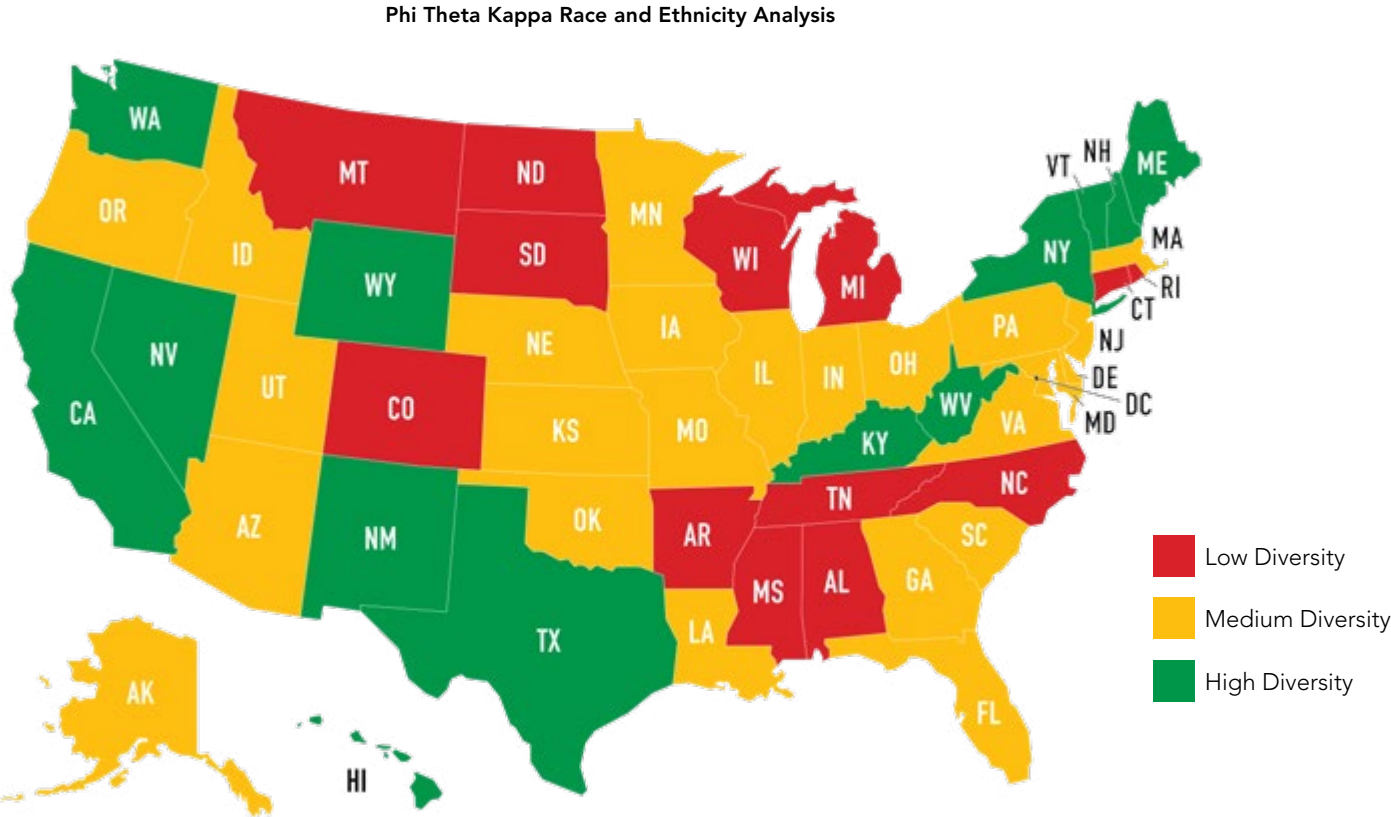
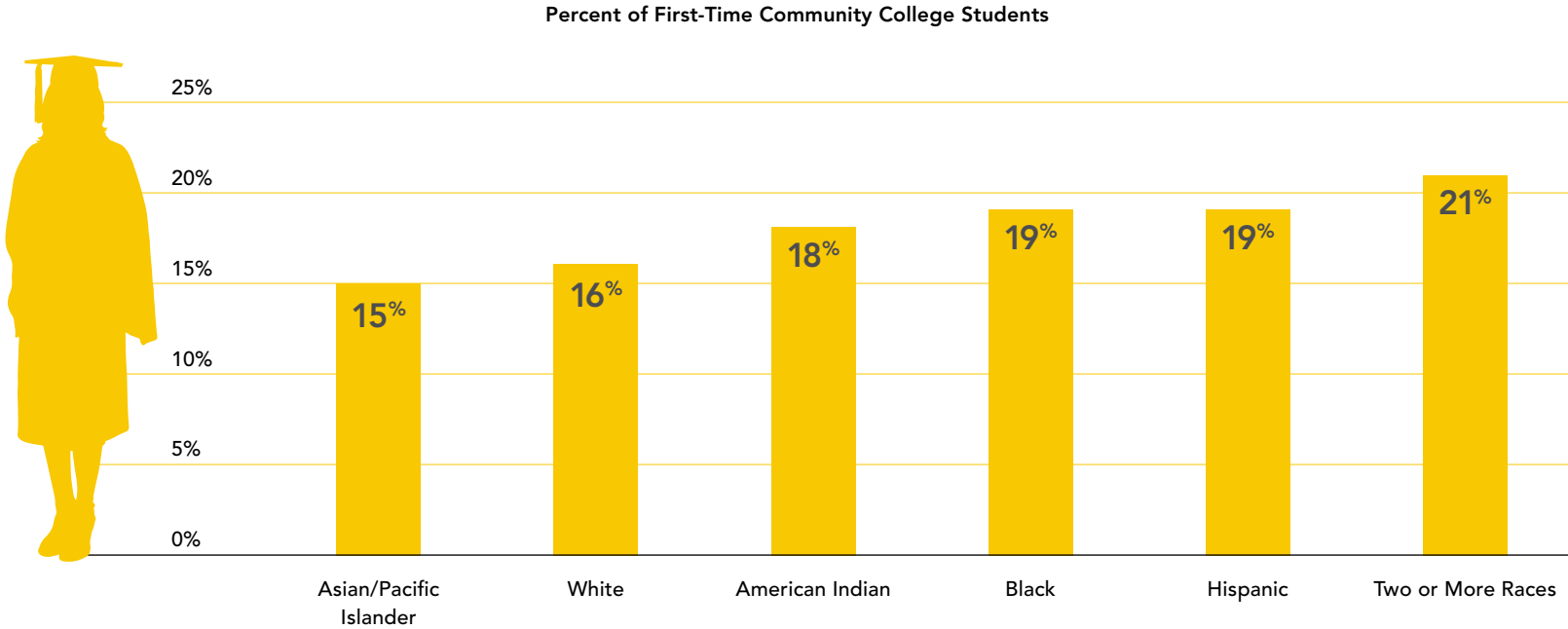


Community college enrollment trends are affected by several factors, the primary of which is economic stability. As the economy improves, unemployment rates decrease and fewer students attend college. Additionally, other factors contributing to the trend of declining enrollment include the rising cost of community college tuition and the declining number of high school graduates since 2010.

The faces of community college students are also changing. Community colleges are serving more high school students than ever before. Nearly all (96%) public two-year colleges have high school students enrolled in college credit programs, as compared to 75% of public four-year institutions. As the

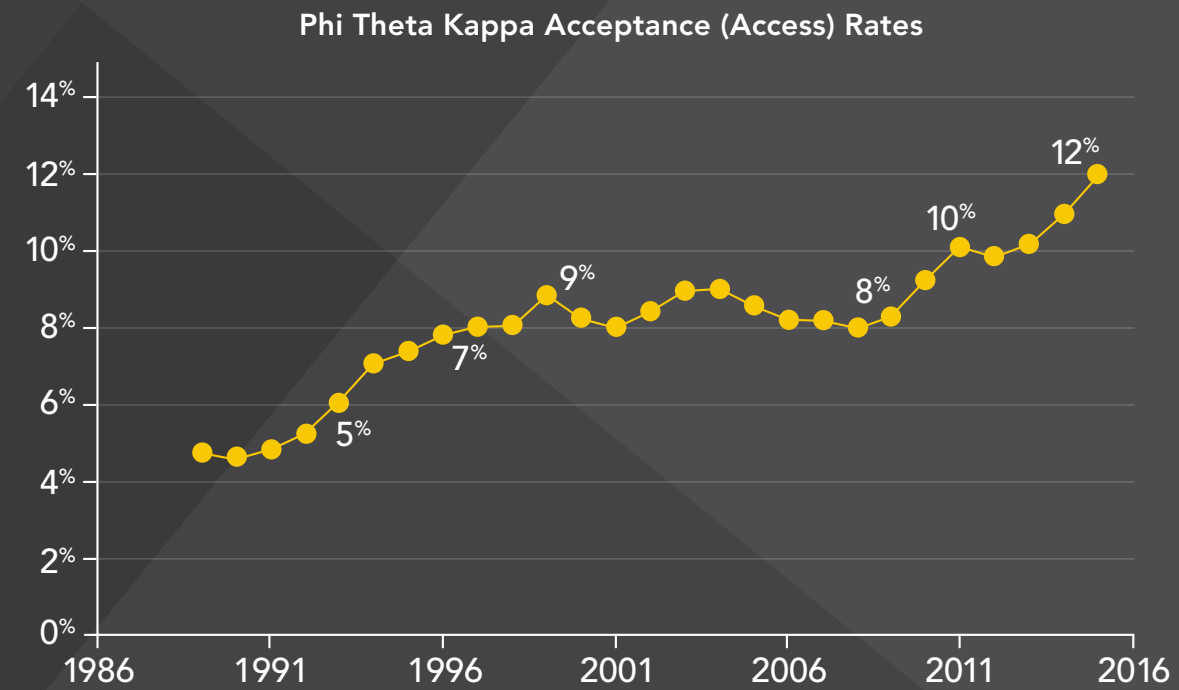
depth of dual enrollment and dual credit programs mature and expand, many high school students are earning 12 hours of credit toward a degree and, in some cases, are earning an entire associate degree while still in high school. Over the past five years, Phi Theta Kappa has grown from only a handful of members under the age of 18 during 2012 to over 6,000 during 2016.

Minorities now make up the majority of first-time community college students. This enrollment trend analysis showed that Hispanics, African Americans, American Indian and students of two or more races enrolled at community colleges were more likely to be first-time students than white students.



Phi Theta Kappa examined the race/ethnicity of its members as compared to the colleges on a state-by-state level. The results were divided into three categories: 1) states where Phi Theta Kappa chapter diversity met or exceeded the diversity of its colleges (green), 2) states where Phi Theta Kappa chapter diversity was slightly less than the diversity of its colleges (yellow), and 3) states where Phi Theta Kappa chapter diversity was significantly lower than the diversity of the colleges (red).

The historical perspective of the Society's membership acceptance rate shows improvement over time. This acceptance rate is calculated as the number of students who join Phi Theta Kappa divided by the number eligible for membership. Gains prior to 1998 were largely due to increasing the numbers of chapters to represent a larger percentage of community colleges (94%). Increases from 2005 to 2012 resulted from the use of online membership acceptance processes and increased use of email to invite qualified students to join. And most recently, gains resulted from additional allocation of resources to assist chapters in delivering invitations both electronically and by mail. This past year, the Society introduced a new membership awards program, REACH Rewards, and acceptance rates are currently at 12%. Moving forward, the Society must look at new and innovative ways to demonstrate the value of membership to prospective members.



“Let your expectations for your institution be known. It is primarily others who will enable the institution to realize your expectations for it.”

— Dr. Shirley B. Gordon  
Phi Theta Kappa Board Chair Emeritus

## ENVIRONMENTAL ANALYSIS

## ENROLLMENT AND MEMBERSHIP TRENDS

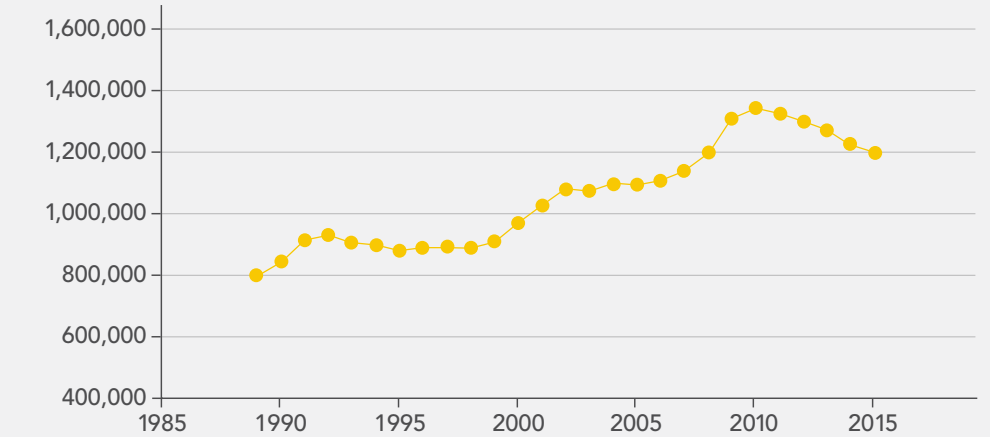
Even though Phi Theta Kappa membership can strongly be predicted by enrollment, the Society has developed strategies to drive growth by providing additional support to local chapters. During the past several years, the Society has provided direct recruitment support for over 400 chapters. While national campaigns can be effective when chapters are unable to perform recruitment efforts on their own, research shows that chapters with the highest rates of membership acceptance have robust and comprehensive local membership campaigns.

In the same way that community college leaders have worked to examine college access, Phi Theta Kappa has spent the past two years identifying membership barriers and examining its own access issues. By developing a deeper understanding of the Society's demographics and the reasons why students do not become members, three overarching barriers have emerged:

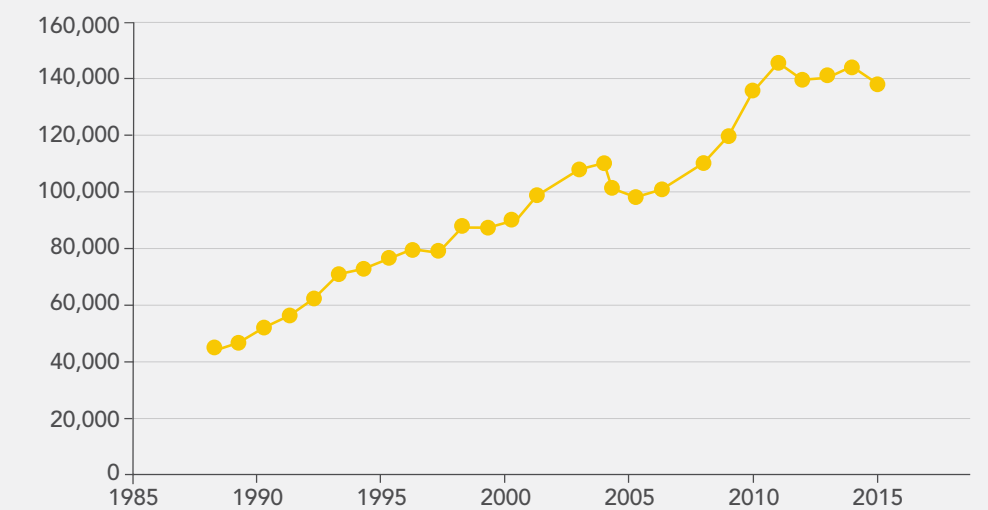
- 1. Cost** – The cost of membership is the central barrier to membership acceptance.
- 2. Communications** – Thousands of emails go unopened, and a significant number of students are not even aware of Phi Theta Kappa membership.
- 3. Benefits for all students** – Phi Theta Kappa is most known for its scholarship opportunities, which have high degrees of variability among states and regions. Benefits for those not intending to transfer are lacking.

### PTK DATA POINTS

College Students Eligible to Join Phi Theta Kappa



Phi Theta Kappa Member Counts







ENVIRONMENTAL ANALYSIS

ALUMNI CHAPTERS  
AND ENGAGEMENT

Phi Theta Kappa has been inducting members for almost a century, yielding more than 3 million alumni; yet we see very low levels of engagement among alumni. Focus groups revealed a need to provide better communications, structure and direction for alumni. Low numbers of alumni chapter members confirm these discussions, as do other indicators of alumni engagement. There are currently 63 alumni chapters with just over 500 members. Annual Convention attendance averages 100 alumni, and rates of annual giving are out of balance when compared to the national nonprofit landscape. Phi Theta Kappa has 10% in individual giving, as compared to the 72% average for nonprofits nationally.

ENVIRONMENTAL ANALYSIS

ALUMNI CHAPTERS AND ENGAGEMENT

In addition to alumni focus groups, research included interviews and site visits with leaders of the Jack Kent Cooke Foundation and Coca-Cola Scholars Foundation — both of which have tremendous success engaging their alumni. The Jack Kent Cooke Foundation provides wrap-around services for their scholars such as advisement, mentorship, and coaching; and the Coca-Cola Scholars Foundation provides a portfolio of engagement opportunities for their alumni.

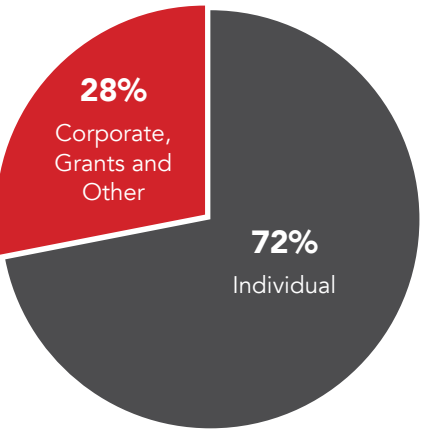
A comprehensive review of other leading national honor societies revealed a gap in alumni benefits and engagement opportunities; but more importantly, it determined that Phi Theta Kappa is failing to leverage our existing alumni.

Phi Theta Kappa has historically invested very little in developing alumni benefits and supporting alumni initiatives. Budget analysis showed that nearly all of the Society's resources are directed toward membership, programming and event activities for current members with few resources allocated toward engagement opportunities for alumni. The website has little to no information about alumni involvement, and staff support for alumni and alumni chapters has also been limited. Moving forward, Phi Theta Kappa has to do a better job, but doing so will require a significant investment of resources.

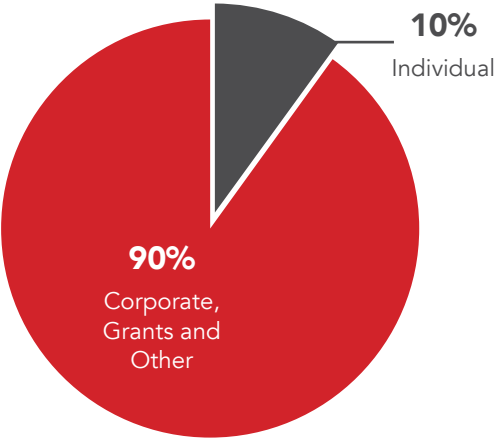
“I want to help, and I want to be involved in Phi Theta Kappa, but I don't know how. What do you want us to do?”

— Elizabeth Taylor  
*Phi Theta Kappa Texas Alumna and Former International Officer*

National Nonprofit Giving Landscape



Phi Theta Kappa Giving Landscape





PTK FOCUS GROUP HIGHLIGHTS



TRUTH

Phi Theta Kappa has yet to develop a communication plan to stay connected to alumni after they leave the community college.



TREND

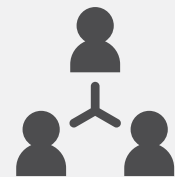
Social media is the area with the greatest level of engagement among alumni.



NEW IDEA

Restructure the Alumni Advisory Council and make certain all geographic areas of the Society are represented through a regionally aligned model.

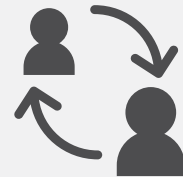
PTK DATA POINTS



The Society has **three types of alumni chapters** — regional associations that work to support regional activities, university associations that connect Phi Theta Kappa transfers to four-year schools, and chapter-level alumni associations that provide direct support to their local chapters.



There are currently **limited member benefits** for alumni. Alumni have access to letters of recommendation, a small number of scholarships, CollegeFish and Competitive Edge.



Our network of alumni is a **considerable untapped resource** that could benefit individual members, chapters, regions and the organization as a whole.



SOCIETY COMMITMENTS



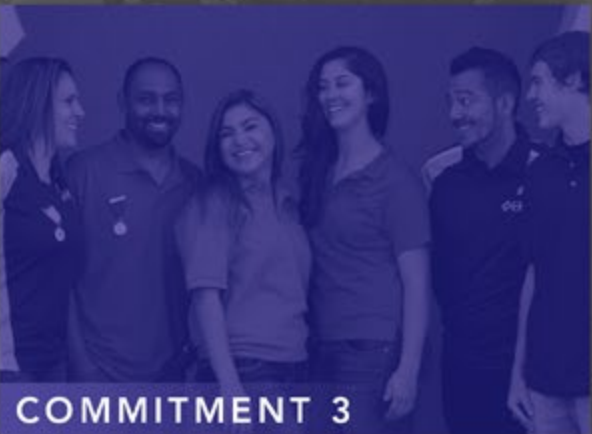
COMMITMENT 1

Strengthen Pathways to Completion, Transfer and Employment



COMMITMENT 2

Increase Transparency, Awareness and Support with New Communications



COMMITMENT 3

Strengthen Chapters and Regions with a Focus on the Society Mission



COMMITMENT 4

Increase Access to Membership by Closing Equity and Inclusion Gaps



COMMITMENT 5

Leverage Society Network by Supporting Alumni Engagement



## COMMITMENT 1



### STRENGTHEN PATHWAYS TO COMPLETION, TRANSFER AND EMPLOYMENT

For the past 45 years, Phi Theta Kappa has put much of its efforts into creating transfer pathways for members. As a result, Phi Theta Kappa offers more than 750 transfer scholarships exclusively for members valued at more than \$37 million annually. Phi Theta Kappa also provides opportunities for additional competitive, merit- and need-based scholarships while still enrolled at the community college and for transfer. Combined, these scholarships, which primarily support transfer, represent Phi Theta Kappa's most significant member benefits.

Phi Theta Kappa has long been known as a transfer engine, and, as a result, the large majority of Phi Theta Kappa members are transfer-bound students. This point is further underscored by high rates of college completion among members. A recent study revealed that Phi Theta Kappa members have a student success rate of 92% (85% completion rate and 7% transfer-out rate), which is three times higher

than that of the average community college student. Moving forward, Phi Theta Kappa will continue to seek ways to strengthen its support of transfer-bound students.

However, we know that the large majority of the nation's community college students are not transfer-bound. In fact, 70% of America's community college students enrolled in community college for the purpose of earning a degree or credential that will put them immediately to work. Moving forward, we expect this number to increase, as America works to fill a growing gap in skilled workers.

In order to better support community college completion and student success, Phi Theta Kappa must make itself relevant to career and technical community college students by developing innovative programming and benefits designed to support all community college students.

## COMMITMENT 1

## STRENGTHEN PATHWAYS

### STRATEGY 1



#### Direct Support for Employment Outcomes

- Fundraise for quality certification exam scholarships, particularly in the areas of healthcare, manufacturing and information technology.
- Demonstrate the value of Phi Theta Kappa to employers by providing co-curricular transcripts of learning outcomes for programs such as Competitive Edge, Honors Institute and Convention, and for chapter-level leadership and learning experiences such as Honors in Action and College Project.
- Cultivate relationships, sponsorships and learning support for industry-specific Competitive Edge experiences (i.e. Competitive Edge for Healthcare Professionals, Competitive Edge for Business Professionals, Competitive Edge for Information Technology, etc.)
- Provide internship experiences with Phi Theta Kappa and its business and corporate partners.
- Increase recognition specifically for career and technical students.

### STRATEGY 2



#### Evolve CollegeFish Student and Recruiter Experiences

- Introduce a CollegeFish phone application experience and allow students to research colleges, search for Phi Theta Kappa and other transfer scholarships, and connect with transfer recruiters.
- Enhance college profiles, dashboards and tools for recruiting Phi Theta Kappa members, offer online recruitment events and provide a curriculum for university recruiters to learn how to recruit Phi Theta Kappa members.
- Facilitate the connection of potential member transfers directly with university and college recruiters.
- Continue the development and improvement of the C4 commitment on the CollegeFish platform.

### STRATEGY 3



#### Provide Robust Scholarship Application Experiences

- Develop seamless integration of scholarship and membership services to eliminate current data transfer and syncs between systems.
- Provide a robust and reliable platform and streamlined processes for the entire life cycle of a Phi Theta Kappa scholarship (application, communications, judging and award). Make the platform flexible enough to allow scholarship growth and changes with minimal development time.
- Partner with the Dell Foundation to integrate ScholarSnapp into the Phi Theta Kappa scholarship application platform.



Fundraise at least \$1 million in certification scholarship benefits for current members and alumni.



The number of Phi Theta Kappa transfer scholarship opportunities will increase from 750 to 1,000.



Double the revenue from CollegeFish advertising, subscriptions and online recruitment events.



At least 50% of Phi Theta Kappa members will actively use CollegeFish to research and plan transfer.



Completed scholarship applications will increase by 25%.



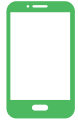
COMMITMENT 2

INCREASE TRANSPARENCY, AWARENESS AND SUPPORT WITH NEW COMMUNICATIONS

Like all organizations, Phi Theta Kappa continues to explore better ways to communicate with our constituents. In recent years, we have made significant progress to this end including transitioning to a new member management system, establishing the Presidential Advisory Board, providing more meaningful social media engagement and establishing The REACH blog. And, while we have made significant progress in improving both the channels and message, Phi Theta Kappa must continue to find new, more effective ways to interact between and among our constituents. In the same way that we know membership cost is a barrier to membership, we also know that messaging, branding and awareness are equally important barriers. Delivering the right message at the right time on the right channels is critical to fulfilling the mission of the Society.




STRATEGY 1



Mobile Application

- Phase one – Release mobile phone application on both android and iOS by Convention 2017. Features will include Convention activities and member/ alumni directory.
- Phase two – Features will include student-centered applications such as CollegeFish, Competitive Edge and other events (i.e. Honors Institute and regional events).
- Phase three – Features will have targeted messaging and allow member communications from regional coordinators and advisors.


STRATEGY 2



Social Media

- Continue improvements to reach constituent groups on the media channels they use on a frequent basis— Facebook and Instagram to reach advisors and non-traditional students, SnapChat and Instagram to reach traditional students.
- Develop a comprehensive strategy to leverage LinkedIn network to connect alumni and increase Phi Theta Kappa awareness.
- Develop a strategy to reach college presidents on Twitter.


STRATEGY 3



Recruitment Tools


- Provide high-quality recruitment tools for chapters and college marketing departments to utilize on all channels (print, social, email, web, etc.).
- Provide a chapter leadership curriculum for new advisors and certification of current advisors and other chapter leaders.
- Continue to use Membership Recruitment Campaign (MRC) for chapters unable to meet recruitment needs, and devise plans for those using the MRC to work toward robust local campaigns.
- Provide focused outreach for any chapter with less than a 10% acceptance rate. Continue rewards systems for high-performing chapters.
- Chapters to submit a written chapter recruitment plan (1-2 pages) as part of one-star certification process. Plans will be evaluated and improved over time.

STRATEGY 4




Improve Infrastructure


- Review Phi Theta Kappa’s governance structure (Society and Foundation)
- Retire legacy phone system and replace with a hosted VoIP phone system to integrate with ERP, reduce future costs and scale for future growth.
- Establish new position, Coordinator of Institutional Research, to provide data analysis for continual improvement of chapter and regions and to improve the operational and decision-making ability of Phi Theta Kappa.
- Replace network infrastructure (hardware- and software-monitoring components) at the Center for Excellence.



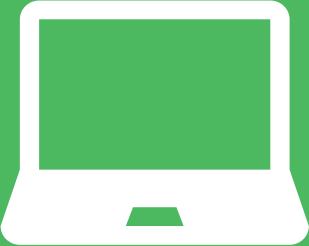
Achieve overall acceptance rate of 15%.




Publish at least twice annually in national media publications or research journals.



100% of chapters will submit recruitment plans.



Year-to-year social media engagement will increase 100%.



80% of all Phi Theta Kappa members will download the Phi Theta Kappa phone application.  
  
100% of all advisors will download the Phi Theta Kappa phone application.

## COMMITMENT 3



### STRENGTHEN CHAPTERS AND REGIONS WITH A PRIMARY FOCUS ON THE SOCIETY MISSION

Although Phi Theta Kappa offers world-class events like Honors Institute and PTK Catalyst (Phi Theta Kappa's Annual Convention), only a small percentage of members will ever interact with Phi Theta Kappa in that way. It is much more likely that Phi Theta Kappa members will participate in chapter and regional meetings than they will ever attend a large-scale Society event. The large majority of member interactions begin and end on community college campuses, occurring locally between members and Phi Theta Kappa's network of more than 3,000 volunteer advisors and regional coordinators. For most members, the Phi Theta Kappa experience is much more local than it is global.

For this reason, we must work to strengthen the infrastructure of our chapters and regions by providing the training and resources necessary to ensure that members at all levels enjoy a robust and worthwhile member experience.

## COMMITMENT 3

## STRONG CHAPTERS AND REGIONS

### STRATEGY 1



#### Regional Support

- Continue grant support of Phi Theta Kappa's regions with the goal of improving regional programming for students and preventing regions from increasing regional fees.
- Add a new position, Associate Vice President of Regional Development, to focus on coordinating regional support from HQ and improving regional activities.
- Continue to expand current regional support (website development, events) and find new ways to support regions in the future.
- Development of a five-star regional recognition plan.

### STRATEGY 2



#### Chapter Support

- Provide a step-by-step chapter activities resource guide. This guide will prescribe a balance of activities that strengthen the four hallmarks of the Society — Scholarship, Leadership, Service and Fellowship.
- Integrate Hallmark Awards activities into the main database and improve submission processing by allowing both written and visual elements and develop an efficient system for the life cycle of Hallmarks (nomination, communication, submission, judging and award).
- Improve awards system to allow for continual recognition of supportive college administrators and introduce Hallmark Awards for trustees.
- Develop and cultivate sponsorship of the first journal of undergraduate research for community college students based on excellence in Honors in Action.

### STRATEGY 3



#### Advisor Support

- Develop an online advisor certification curriculum and awards system for completers.
- Increase communications directly to presidents about chapter accomplishments and advisor engagement.
- Expand advisor recognition during Convention advisor luncheon and cultivate sponsorship of special awards and recognition of advisor excellence.
- Cultivate college faculty support of Phi Theta Kappa by implementing a national faculty recognition campaign.





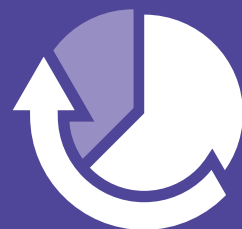
Increase average length of service of advisors from three to five years.



At least 75% of regions will reach five-star within 3 years, and 100% of regions will be five-star in five years.

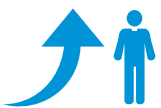


Cultivate sponsorship of advisor programs and recognition.



Increase percent of five-star chapters to 75%.

COMMITMENT 4



INCREASE ACCESS TO MEMBERSHIP BY CLOSING EQUITY AND INCLUSION GAPS

In many ways, Phi Theta Kappa members are not very different from other community college students. While members are very similar in the areas of age, gender, first generation status, and federal Pell Grant eligibility, when compared to all community college students, they differ in one significant way. Phi Theta Kappa members are less diverse than the average community college student, with only one in three being a person of color, compared to one in two nationally. Moving forward, Phi Theta Kappa will implement programs and strategies designed to both increase access to membership and close equity gaps among eligible students so that we can more closely mirror the community college population it serves.

We know that the cost of membership is the number one reason eligible students do not accept membership, and we believe this is a significant contributor to the lack of diversity among our members. In 2016, the Phi Theta Kappa Foundation launched the Golden Opportunity Scholarship — the first scholarship that

supplements the cost of membership to students who could not otherwise afford it. Moving forward, raising money to open the door of opportunity to Phi Theta Kappa membership will continue to be a top priority for both Phi Theta Kappa and the Phi Theta Kappa Foundation. However, Phi Theta Kappa must also look at ways to keep the cost of membership low for all deserving students.

Membership costs are directly correlated with program costs. Over time, Phi Theta Kappa has absorbed the costs of programs that initially began with grant support, including the Faculty Scholars, *Nota Bene* Literary Competition, CollegeFish and Leadership Development. While these programs greatly benefit our constituents, we must either identify organizations that are willing to provide funding support for them or re-invent these programs so they appeal to current philanthropic interests.

STRATEGY 1



Golden Opportunity Scholarship

- Triangulate efforts to fund the Phi Theta Kappa Golden Opportunity Scholarship by including individual giving, corporate and foundation sponsorship, grants and store product sales.
- Provide a comprehensive marketing plan for Golden Opportunity Scholarship.
- Provide technology support for robust disbursement of Golden Opportunity Scholarships at the chapter level.

STRATEGY 2



Diversity Awareness

- Cultivate diversity awareness among chapters and regions and provide diversity education to chapters and recognition for those meeting high levels of diversity and inclusion.
- Increase cultural and diversity awareness in our media and events.
- Be intentional in creating diversity among staff in our recruitment efforts. Provide diversity training for staff that improves their thoughts, opinions, attitudes and actions toward people of diverse backgrounds.

STRATEGY 3



Prevent Increases in Membership Fees

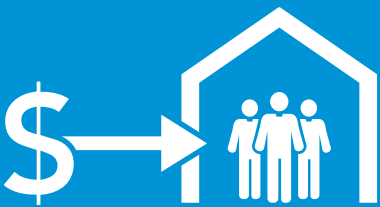
- Establish new position, Director of Strategic Alliances and Grants, providing leadership for identifying and establishing new relationships for the support of Society programs.
- Many Phi Theta Kappa scholarships are supported through corporate affinity programs. By endowing these scholarships, affinity funds can be used to stimulate other projects.
- Cultivate endowment and grant support for current programming activities such as Faculty Scholars, Honors Institute speakers, Convention speakers, Transfer Honor Roll, the Veteran Honor Cord and *Nota Bene*.



Fundraise for at least 100,000 Golden Opportunity members over the next five years.



Provide a \$5 million endowment for Phi Theta Kappa-sponsored scholarships.



Provide external foundation, grant or giving support for Faculty Scholars, Honors Institute and Convention speakers, Transfer Honor Roll, *Nota Bene* and the Veteran Honor Cord.



The Society's diversity index will equal the diversity index of community colleges.



## COMMITMENT 5



### LEVERAGE SOCIETY NETWORK BY SUPPORTING ALUMNI ENGAGEMENT

Engagement levels among Phi Theta Kappa's more than 3 million alumni are extremely low. This is largely the result of a lack of clear, structured and scalable opportunities for alumni members to interact with Phi Theta Kappa beyond their community college experience. Communication between the Society and alumni has also been a challenge, as the Society has not implemented a communications plan designed to capture students' contact information before graduation or transfer. In essence, Phi Theta Kappa has "lost touch" with the majority of members.

Significant numbers of alumni and current members have expressed a strong desire to stay connected to Phi Theta Kappa beyond their time in a community college. This relationship will not only benefit the alumni, but it will also strengthen the very fabric of the Society. Phi Theta Kappa is committed to investing in our alumni by providing meaningful opportunities for them to engage with the Society.

## COMMITMENT 5

## ALUMNI ENGAGEMENT

### STRATEGY 1



#### Alumni Structure

- Establish new position, Director of Alumni Engagement, providing leadership for the engagement of alumni.
- Establish a 29-member Alumni Advisory Board with one representative, appointed by the regional coordinator from each region. Alumni officers shall be elected from the members of the Alumni Advisory Board.
- Improve alumni support for the mission and vision of Phi Theta Kappa regional activities.

### STRATEGY 2



#### Create a Portfolio of Alumni Engagement Opportunities

- Coordinate HQ webinars from and for alumni members on topics to promote career and personal success.
- Provide engagement opportunities for alumni as transfer coaches and as career coaches.
- Improve visibility of alumni information by adding alumni to the Society website and publish profiles of those in leadership positions.
- Provide a robust alumni speakers bureau to assist chapters and regions.

### STRATEGY 3



#### Increase Alumni Benefits

- Expand scholarships by increasing numbers of bachelor's and master's degree scholarships, certification scholarships and scholarships to help pay special admission exam fees.
- Increase professional contacts among member network by leveraging and fostering existing social media/career media technologies.
- Offer financial services benefits such as automotive and health insurance benefits.



Increase numbers of alumni attending Convention to an average of 200.



Increase numbers of engaged alumni from 500 to 3,000.



Increase percent of individual giving from 10% to 20% of annual Foundation activities.

SOCIETY COMMITMENTS

COMMITMENT 1:

Strengthen Pathways to Completion, Transfer and Employment

COMMITMENT 2:

Increase Transparency, Awareness and Support with New Communications

COMMITMENT 3:

Strengthen Chapters and Regions with a Primary Focus on the Society Mission

COMMITMENT 4:

Increase Access to Membership by Closing Equity and Inclusion Gaps

COMMITMENT 5:

Leverage Society Network by Supporting Alumni Engagement

STRATEGIES

Support for Employment Outcomes  
Evolve CollegeFish User Experiences  
Provide Robust Scholarship Application Experiences

Mobile Application  
Social Media  
Recruitment Tools  
Improve Infrastructure for Communications

Regional Support  
Chapter Support  
Advisor Support

Golden Opportunity Scholarship  
Diversity Awareness  
Prevent Increases in Membership Fees

Alumni Structure  
Create a Portfolio of Alumni Engagement Opportunities  
Increase Alumni Benefits

OUTCOMES BY 2022

Over 1,000 four-year institutions will offer Phi Theta Kappa transfer scholarships with \$1 million in workforce-readiness benefits.



Achieve overall acceptance rate of 15%.

At least 75% of chapters and 100% of regions will be five-star.



Fundraise for at least \$2 Million for Golden Opportunity Scholarships.

Reach at least 50% of College presidents each year







**Dr. George Boggs**  
Chair

**International Honorary Member Representative**

Superintendent/President Emeritus, Palomar College  
President and CEO Emeritus, American Association of Community Colleges  
San Marcos, California



**Pattie Van Atter**  
Vice Chair

**Regional Coordinator Representative**

Middle States Regional Coordinator  
Delaware Technical Community College  
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**Dr. Lynn Tincher-Ladner**  
Ex-Officio and Secretary

President and CEO

Phi Theta Kappa Honor Society  
Jackson, Mississippi



**Dr. Jo Marshall**  
Chair

International Honorary Member  
President  
*Somerset Community College*  
*Somerset, Kentucky*



**Cassius O. Johnson**  
Vice-Chair

Former Phi Theta Kappa International President  
Senior Director of Policy & Government Affairs  
*Year UP*  
*Boston, Massachusetts*



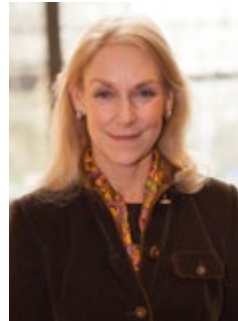
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President and CEO  
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**J. Mark Davis**  
Treasurer

International Honorary Member  
President, *Coca-Cola Scholars Foundation*  
*Atlanta, Georgia*



**Valerie Baldwin**

**Alumni Representative**

Clerk, U.S. House of Representatives Committee on Appropriations  
Washington, D.C.



**Dr. Michael Odu**

**Chapter Advisor Representative**

Dean, School of Mathematics, Science and Engineering  
Southwestern College  
Chula Vista, California



**Dr. Daniel J. Phelan**

**Community College Administrator Representative**

President  
Jackson College  
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**Dr. George Boggs**

International Honorary Member  
Immediate Past-President and CEO  
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**Student Representative**

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Phi Theta Kappa Honor Society  
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Interim Executive Director  
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Alumnus  
Former Ambassador to Ethiopia and Burkina Faso  
Author  
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Associate Vice  
President, Leadership  
and International  
Education



**Paige Chandler**  
Director of Financial  
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**Susan Edwards**  
Associate Vice  
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**Wendy Giammarco**  
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**Stacey D. Griffith**  
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**Christin Grissom**  
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Executive Assistant  
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**Fredrica Tyes**  
Foundation Executive  
Assistant and Donor  
Services Coordinator



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Phi Theta Kappa Honor Society is an international honor society that recognizes and encourages scholarship among two-year college students. The honor society represents 1,285 chapters at more than 1,000 two-year associate degree-granting institutions and annually inducts approximately 130,000 students.

The replication of any portion of this document must be approved by Phi Theta Kappa.

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