MISSION

To fulfill the principles of *The Bond* by providing our members with a lifetime association that enhances success, enjoyment and fulfillment in life.

★ ★ ★ ★ ★ ★

VALUES

Friendship, Sound Learning and Rectitude.

★ ★ ★ ★ ★ ★

VISION

To be the premier fraternal leadership development organization in North America.
Strategic planning has become part of Phi Delta Theta’s DNA. Our North Star for the last nine years, Phi Delt 2020, provided direction, measured success, and changed the course of Phi Delta Theta. This resulted in organizational bests and industry-leading results in membership growth, educational opportunities for members, endowment expansion, and much more.

This snapshot is a representation of these tremendous results and a bridge towards our next strategic plan Phi Delt 2030. In the final years of Phi Delt 2020, with most of its goals achieved or exceeded, the Phi Delt 2030 planning process used member insights, a peer review, and environmental information including higher education, economic, and societal data to determine the opportunities and threats of our organization. Phi Delt 2030 will begin on July 1, 2020 and will ensure Phi Delta Theta reaches its vision to be recognized as the premier fraternal leadership development society in North America.

For an in-depth look at the Fraternity’s strategic plans, visit phide.lt/strategicplan.
GROWTH

Execute strategies for the expansion of new chapters and the growth of existing chapters to achieve 200 chapters and the largest average chapter size in the Fraternity world.

| INSTALLED CHAPTERS ★ SCHOOL |
|-----------------------------|----------------------------------|
| Florida Omicron             | Nova Southeastern University     |
| Virginia Iota               | Old Dominion University          |
| Colorado Alpha              | University of Colorado           |
| South Carolina Beta         | University of South Carolina     |
| New Jersey Delta            | Stockton University              |
| New York Eta                | Rochester Institute of Technology|
| Georgia Theta               | Augusta University               |
| Pennsylvania Sigma          | Millersville University          |
| Wisconsin Zeta              | University of Wisconsin, Whitewater|

<table>
<thead>
<tr>
<th>COLONIZATIONS ★</th>
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</thead>
<tbody>
<tr>
<td>Iowa Delta</td>
</tr>
<tr>
<td>Georgia Iota</td>
</tr>
<tr>
<td>Minnesota Alpha</td>
</tr>
<tr>
<td>Illinois Beta</td>
</tr>
<tr>
<td>Texas Tau</td>
</tr>
<tr>
<td>Oregon Epsilon</td>
</tr>
<tr>
<td>Kansas Epsilon</td>
</tr>
<tr>
<td>Pennsylvania Tau</td>
</tr>
<tr>
<td>New Jersey Epsilon</td>
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</tbody>
</table>
Goal: 200 Chapters and Colonies by 2020

Currently: 191

13,437
Total undergraduates
- Goal: 14,000 by 2020

13,093
undergraduates 2017–18

13,437
undergraduates 2018–19

16%
Growth in last decade

39%
Growth in last decade

4,856
Number of new members in 2018–19

36%
Growth in last decade

81%
new member retention 2018–19
- 76 percent new member retention 2017–18

72
Average chapter size in 2018–19
- Goal: 70 by 2020
Develop a holistic educational effort through programs that utilize technology and promote our values to undergraduate and alumni members.

**Kleberg Emerging Leaders Institute**
- 2018 attendance: 919
- 15,745 members educated since 1987

**Phi Kappa Eta Educators College**
- 2018 attendance: 169
- 642 members educated since 2014

**Shafer Honors College of Leadership**
- 2018 attendance: 61
- 359 members educated since 2014

**President’s Leadership Conference**
- 2019 attendance: 257
- Set attendance record
- 56 percent of attendees were graduates of the Kleberg Emerging Leaders Institute
Goal: 18,000 In-Person Leadership Conference Attendees by 2020

Currently: 17,291 – 2,655 educated in 2018–19

1,556
Number of participants
- Inaugural 22 province retreats
- 71 average attendees/retreat
- Approximate cost per attendee to conduct retreats: $25

4,514
Number of individuals educated online through certification in 2018–19
- Goal of 5,000 annual online learners to be reached next year

437
Number of Chapter Advisory Board members who have completed the revised CAB certification module

The To Do What Ought To Be Done educational initiative introduces important bystander intervention education and communications to undergraduate Phis. 100 percent of our chapters and colonies were educated on this important educational initiative during the 2018–19 academic year via in-person and online educational components.

- Leadership consultants gave 190 in-person presentations
Build a strong chapter and alumni support structure to improve operations and to offer the finest and safest housing in the fraternity world.

**CHAPTER RETENTION**

99%

- 2018–19
  - 91 percent in 2017–18

**FRATERNITY HOUSING**

128

- Number of chapters with housing facilities
  - 66 percent of chapters are housed
    - 67 percent of chapter houses have sprinklers

**RISK MANAGEMENT**

20%

- Growth since last year

1,669

- # of event planning forms submitted in 2018–19

**LIABILITY INSURANCE COST PER MEMBER**

- $203 All-fraternity average
- $100 Phi Delta Theta
**CAPACITY**

Strengthen the operational infrastructure of the General Headquarters through the leverage of technology and talent.

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**AVERAGE CHAPTER GPA**

3.07

Average chapter GPA

- 82 percent of chapters above the all men’s GPA average on campus

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**CHAPTER PHILANTHROPY**

$973k+

Total philanthropic dollars raised in 2018–19

- 8 percent increase from last year
- $537,887 raised for LiveLikeLou (55 percent of total)
- 47 percent of chapters financially supported LiveLikeLou—up from 26 percent
- $72 raised/undergraduate member

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**AWARDS**

135

Number of chapters that submitted an awards application

- 511 awards given
- 64 percent increase from last year

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**LEADERSHIP CONSULTANTS**

315

Leadership consultant visits in 2018–19

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Goal: 1,000 Chapter Advisory Board members by 2020

Currently: 1,170

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**CHAPTER PHILANTHROPY**

315

Leadership consultant visits in 2018–19

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COMMUNICATIONS

Promote our value to members, potential members and stakeholders.

<table>
<thead>
<tr>
<th>Total Number of “Good …”</th>
<th>Percentage of Membership</th>
</tr>
</thead>
<tbody>
<tr>
<td>148,868 Mailing Addresses</td>
<td>78% of membership</td>
</tr>
<tr>
<td>95,817 Email Addresses</td>
<td>50% of membership</td>
</tr>
<tr>
<td>60,567 Mobile Numbers</td>
<td>32% of membership</td>
</tr>
</tbody>
</table>

**EMAIL OPEN RATES**

- Palladian Window: 34% (Increased by 4 percent)
- Scroll Extra: 20%
- Welcome Email to New Parents: 66% (Increased by 2 percent)

**CHAPTER GREATNESS CHECKLIST REPORTING**

The Chapter Greatness Checklist hosts the collection of reports that chapters must submit each year. 86 percent of reports were collected in 2018–19.
The Fraternity uses digital outreach/advertisement to specific audiences to generate interest in joining and volunteering.

- 22,879 visits to futurephidelt.org
- 971 interest forms filled out by potential new members
- 194 interest forms filled out by potential volunteers
Implement strategies to significantly grow the Fraternity’s Foundation endowment and develop other regular revenue streams.

**FUNDING**

$21 Million

Reached Phi Delt 2020 Foundation endowment goal two years early

$227,200

Scholarship and fellowship dollars granted in 2018–19

$19k

Amount raised by the Knights of Pallas student giving program in 2018–19

$1.06M

Phi Delt Fund 2018

- 329 scholarship and fellowship applications received

- 984 new donors

**The Phi Delta Theta Foundation exists to strengthen men for life by building on the tradition of our core values: Friendship, Sound Learning, and Rectitude. It started with scholarships, and now today, a whole lot more!**

Phi Delta Theta is extremely grateful to those who believe in its mission through their generous donations to the Foundation. The support received is helping Phi Delta Theta achieve its Phi Delt 2020 vision of becoming the premier fraternal leadership organization in North America.

To make a donation, visit phideltatheta.org/donate

$294k+

Amount raised in 2018–19

- 35 percent increase from 2017–18
  - 150 Iron Phis in 2018
  - Total number of Iron Phis: 881