



TAU KAPPA EPSILON **STRATEGIC PLAN**



2025 — 2030 STRATEGIC PLAN

BOUNDLESS OPPORTUNITIES &
TIMELESS VALUE

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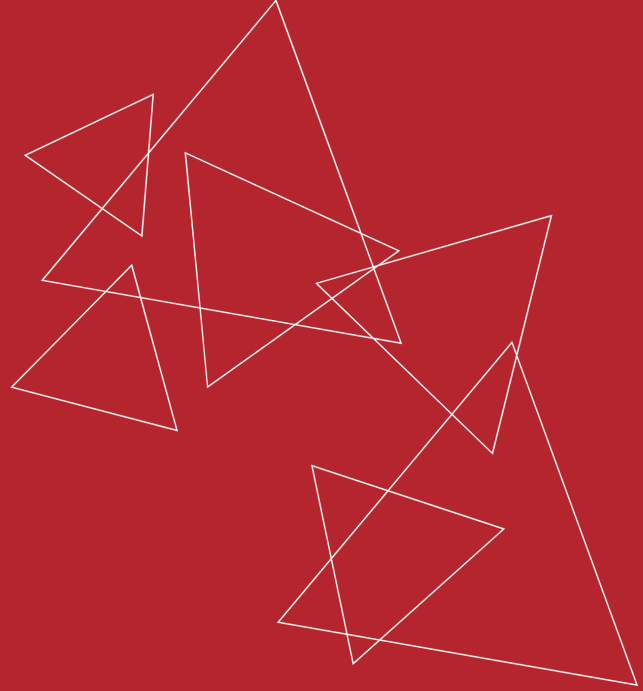
STRATEGIC PLANNING

Envision Our Future

Over the years, TKE has maintained a preeminent leadership position among peer organizations. Much of this ongoing success is a result of TKE adopting a strategic posture rooted in five-year strategic planning cycles. The sequences are based on data-rich assessments, surveys, and trend analysis. Accordingly, TKE has established a culture of high expectation, always aiming higher by planning strategically to define success objectively.

"The strategic planning process ... builds on strengths, opportunities, confronts challenges, and generates universal support."

—Anonymous Survey Respondent



The 2025-2030 Strategic Plan, Boundless & Timeless, identifies new goals, objectives, and performance criteria that will guide and shape the future of TKE for the next five years. As we complete the very successful 2020-2025 Strategic Plan, we are very well-positioned to sustain the momentum. We are all fully vested in the potential of TKE and prepared to meet the challenges of a growing organization and pursue opportunities that will catapult TKE to even greater levels of growth.

Donald E. Aldrich, Chief Executive Officer
Ryan J. Vescio, Esquire, Grand Prytanis
James E. Crockard, III, Chairman, TKE Foundation





HISTORY & TRADITION

Tau Kappa Epsilon was founded on the cold night of January 10, 1899, after the discussion of a new society that regarded men not for wealth, rank or honor, but for personal worth and character.

OUR BROTHERHOOD

Advancing character and personal development means unlocking the potential for each man to be a great college graduate and productive citizen. A Teke is a man who is trustworthy and lives the values enunciated in our Declaration of Principles, helping each member integrate LOVE, CHARITY, and ESTEEM into his daily life.

OUR MISSION

Our mission is to aid men in their mental, moral, and social development for life. With nearly 12,000 collegiate members, Tau Kappa Epsilon contributes to the advancement of society through the personal growth of our members, and service to others. TKE builds Better Men for a Better World.

OUR VISION

Tau Kappa Epsilon creates lifelong relationships that enhance educational, interpersonal, community and professional success.



OUR POTENTIAL

Mapping strategic direction is one of the most important tasks of an organization's leadership. The start of the 2025-2030 strategic planning process involved a critique of the 2020–2025 plan, the identification of new opportunities, and a deep commitment to expanding TKE's mission and purpose. These overarching objectives are contributing to the development of a new roadmap for continued growth and success.

At TKE, we never lose faith in the potential for being the best as we journey from great to exceptional. Being 'quite good' is not enough, pursuing exceptional is the vision.

OUR PURPOSE

TKE contributes to the advancement of society through the personal growth of our members and service to others.

OUR PROGRESS

The 2020-2025 Strategic Plan led to many new initiatives that advanced the trajectory of growth throughout the TKE national and international landscape. Today, TKE continuously moves from good to great to exceptional — remaining uncompromisingly faithful to basic values with an unyielding commitment to mission.

Recently, the Grand Council, Foundation Board and administrative team conducted an analysis of progress of the 2020-2025 Strategic Plan. The assessment was instrumental in determining the effectiveness of the current plan and its overall impact over the last five years. This type of analysis provided the underpinning for framing bold yet achievable goals with strategies that have well-defined success measures.



TKE IN THE SPOTLIGHT

It is without any question that TKE has a distinct mission that sets it apart from other international fraternities. The 2020-2025 Strategic Plan was a very bold and ambitious endeavor, fueled by a steadfast commitment to mission growth.

The Strategic Plan was centered on **People, Programs, Potential, Promise** and was built upon our tradition of excellence as we charted our course for the future.

Major Accomplishments of the 2020-2025 Strategic Plan:

- ▶ The consolidation of the Grand Council and the Foundation Board with a new centralized voice and the integration of a one CEO model
- ▶ During the pandemic, TKE saw increased growth, one of only a few Greek organizations with such notable progress during such a challenging time
- ▶ Revenue streams were improved with increased financial support from new donor growth, unrestricted giving, and an expanded commitment to the **Life Loyal Teke** (LLT) program
- ▶ To sustain financial sustainability, a streamlined annual fee structure was approved
- ▶ Membership retention rates grew to highest levels since 2017; new membership growth outperformed projections —the strongest since 2017
- ▶ Grand Chapter size grew **3.1%** in 2022-2023 over the previous year
- ▶ The TKE Capital Campaign raised **\$375K** in conjunction with the 125th anniversary
- ▶ New virtual learning modules were created within edu.tke.org
- ▶ Investments of **\$40,000** were made to support technology upgrades
- ▶ Increased officer and volunteer training programs were introduced
- ▶ TKE elevated its partnership with St. Jude with an unprecedented commitment of **\$10M** over the next ten years
- ▶ A mission-centered D&I Committee was formed to develop essential documents, including a Statement of Inclusion
- ▶ The **Alumni Volunteer Academy** was held again in-person to engage graduates in all alumni functions



OUR COLLABORATIVE EFFORTS AT WORK

The Grand Council and Foundation Board members, along with the leadership team, have created a Strategic Plan that outlines four major priorities going forward. This Strategic Plan was developed through an internal Board survey followed by a full-day planning retreat where TKE leadership explored the potential and essential resources needed to achieve a mission-centered growth plan.

During the retreat, the Boards engaged in an in-depth discussion centered on the following five thematic questions:

- ▶ Where are the gaps between the state of TKE today and what we want TKE to be in five years?
- ▶ What is the future we most desire?
- ▶ How do we create and present a new five-year plan that is both inspiring and grounded in mission ... Aid men in their mental, moral, and social development for life?
- ▶ What are the long-term prospects for creating more value to our members?
- ▶ How will the planning process go beyond the board room and include the thoughts, ideas, and opinions of Chapter leadership?

The planning retreat resulted in the construction of a five-year Conceptual Framework. The Boards then sought input from Chapter leadership and distributed the Framework to 276 Chapter leaders, representing 31 states and 70 colleges and universities. The result of the national survey led to the formation of the 2025-2030 Strategic Plan.

“TKE should remain solidly focused on competitive excellence.”

—Anonymous Survey Respondent



MAJOR PRIORITIES

Pursuing The Enduring Quest Of Excellence

- 1 LEADERSHIP & INNOVATION
- 2 CONNECTION & AFFILIATION
- 3 RESPONSIBILITY & ACCOUNTABILITY
- 4 ADEPTNESS & AGILITY

“All strategic roads ... lead to quality programs, value-based affiliation, and lifelong networks.”

—Anonymous Survey Respondent

STRATEGIC GOALS & OBJECTIVES





BOLSTER ORGANIZATIONAL LEADERSHIP & INNOVATION



CHIEF OBJECTIVE:
TO FULLY OPTIMIZE & ACCELERATE MISSION POTENTIAL BY
INVESTING IN LEADERSHIP DEVELOPMENT & HUMAN RESOURCES

SUPPORTING OBJECTIVES

- ▶ 1:1 Inspire innovation throughout the Fraternity
- ▶ 1:2 Leverage the full potential from the Grand Council and Foundation partnership
- ▶ 1:3 Invest in professional development of aspiring leaders, staff, and volunteers
- ▶ 1:4 Examine organizational scale and the rightsizing of the fraternity to allocate adequate resources
- ▶ 1:5 Engage in systematic assessment of the Grand Council and Foundation Board leadership to ensure exemplary governance is leading the strategic vision



2

EXPANDING MEMBERSHIP THROUGH CONNECTION & AFFILIATION



CHIEF OBJECTIVE:
TO ATTRACT & RETAIN LIFELONG FRATERNAL AFFILIATION

SUPPORTING OBJECTIVES

- ▶ 2:1Adapt to shifting demographics that may influence Chapter growth
- ▶ 2:2Renew and renovate inspirational marketing messaging around the value of fraternal affiliation; inspire long-term membership in college and beyond
- ▶ 2:3Mitigate attrition in struggling Chapters —ensure Chapters have the guidance and resources to remain strong and viable
- ▶ 2:4Introduce additional alumni engagement opportunities and strengthen alumni networking initiatives
- ▶ 2:5Assess, refine, and introduce distinctive value-added outreach programs



3

PRESERVINGFINANCIAL RESPONSIBILITY & ACCOUNTABILITY



CHIEF OBJECTIVE:
UTILIZE PRUDENT & JUDICIOUS FINANCIAL PLANNING &
FORECASTING TO SAFEGUARD ALL FINANCIAL OPERATIONS

SUPPORTING OBJECTIVES

- ▶ 3:1 Develop a complementary five-year fundraising plan to support the strategic plan and to significantly expand the culture of philanthropy
- ▶ 3:2 Engage the Grand Council and Foundation as ambassadors and advocates to cultivate enterprise partnerships and major donor support in all major fundraising efforts —establish goals and anticipated outcomes
- ▶ 3:3 Upgrade all giving formats and related social media platforms to reach donors in diverse demographic ranges
- ▶ 3:4 Invest in people and human resources –become an organization revered for building professional careers
- ▶ 3:5 Allocate sufficient funding to sustain substantive risk management practices that proactively address issues of health, safety, and overall wellness



4

ENHANCING INSTITUTIONAL ADEPTNESS & AGILITY



CHIEF OBJECTIVE:
FORMULATE & UTILIZE A COMMITTEE-DRIVEN TACTICAL ACTION PLAN TO SUPPORT THE IMPLEMENTATION OF THE 2025-2030 STRATEGIC PLAN

SUPPORTING OBJECTIVES

- ▶ 4:1 Create a Strategic Plan Oversight Committee with the charge to develop goal-oriented action plans that will guide the implementation of the Strategic Plan
- ▶ 4:2 Develop dashboard reporting measures to monitor tracking, annual recalibration, and midcourse adjustments
- ▶ 4:3 Establish success measures, metrics, milestones, and benchmarking tools that will provide full transparency to the Grand Council and Foundation
- ▶ 4:4 Generate a strategic technological growth plan that will utilize a modern digital infrastructure to enhance operational effectiveness, efficiency, and productivity
- ▶ 4:5 Connect regularly with colleges and universities to ensure a mutually beneficial and supportive relationship that supports the central mission of TKE membership.

Tactical Pathways Forward

To support the goals of the Strategic Plan, there are specific ways in which TKE will engage in precise tactical activity that will move the plan forward.

These tactical plans are designed to propel TKE to higher levels of impact—meeting the needs of its national and international Chapters—and strengthening its place as a leading fraternal organization. Moreover, these tactical strategies involve each goal in a unique way. The aggregate effect of these specific strategies will enhance the overall progress of the Strategic Plan over the next five years.



1 | MISSION DRIVEN

- ▶ M:1 Sustain an evaluation process for ongoing assessment of programs
- ▶ M:2 Construct inspirational messaging around the fraternal brotherhood —TKE for life
- ▶ M:3 Build on the ongoing commitment to D&I by both word and deed
- ▶ M:4 Create TKE in the Spotlight —profiles of alumni influenced by the TKE experience
- ▶ M:5 Assess mission and culture via periodic survey and analysis

2 | LEADERSHIP DRIVEN

- ▶ L:1 Evaluate and revitalize struggling Chapters with education, leadership, and training
- ▶ L:2 Customize outreach by adapting to more socially aware, safety conscious, and technology-driven students
- ▶ L:3 Collaborate frequently with colleges to create a full array of social, professional, and service-oriented experiences –cultivate the power of partnerships
- ▶ L:4 Evaluate risk management policies and associated programs aimed at marginalizing high risk incidents
- ▶ L:5 Utilize the boards' social, reputational, and political capital to form business partnerships uncovering new funding sources

3 | INNOVATION DRIVEN

- ▶ I:1 Optimize innovation opportunities with an Innovation Task Force
- ▶ I:2 Study the reconfiguration of the traditional four-year undergraduate model and its potential impact on future membership
- ▶ I:3 Invest in a restructured administrative staffing model proportional to the new strategic vision
- ▶ I:4 Study world-class innovation models among the finest fraternal organizations
- ▶ I:5 Provide ample opportunities for Chapters to introduce innovative programs

Advancing TKE's mission and reputation as the premier fraternal organization is at the heart of the 2025-2030 Strategic Plan. We will have heightened levels of influence in the lives of our members by conscientiously applying the strategic plans developed.

To this end, we are dedicated to preserve our core values and stimulate progress —becoming exceptional by choice.



ASSESSING PROGRESS

Accelerating Mission: Achieving the Vision

Over the next five years, TKE will chart accomplishments, assess ongoing efforts, and evaluate the impact of new opportunities. The 2025-2030 Strategic Planning process will contribute to TKE's steady ascent, representing a model of fraternal excellence. We will hold ourselves accountable by measuring progress with metrics, methods, and desired outcomes.

Specific Measurable Outcomes:

- ▶ Number of new Chapters
- ▶ Overall membership growth
- ▶ Average Chapter size
- ▶ Higher levels of ongoing engagement post collegiate years
- ▶ Greater revenue generation through fundraising and philanthropic strategic plans
- ▶ Attendance at leadership Forums, Regional Leadership Conferences, Conclave, etc.
- ▶ High carryover rates from collegiate years to alumni ranks

Broader Methods of Measuring Progress

- ▶ Study qualitative survey outcomes of new innovative programs
- ▶ Evaluate the expanded recruitment process
- ▶ Examine the effectiveness of the Grand Council/Foundation partnership
- ▶ Assess staffing and administrative roles needed to advance the strategic agenda
- ▶ Evaluate the new collaborative synergies with TKE's colleges and universities
- ▶ Analyze the investment in advanced information systems and new digital technologies
- ▶ Determine results from investments made in Chapters needing direction and support

Social Outcomes Permeating Fraternal Culture

- ▶ An inspired and unified fraternity embracing a shared strategic vision
- ▶ Renewed faith in the importance of mission —how every member impacts its value
- ▶ Greater appreciation for the life-long influence of TKE principles and ideals
- ▶ Deepened belief in the power of brotherhood and collective achievement
- ▶ Unequivocal commitment to mental, moral, and social development for life



FROM ASPIRATION TO REALITY

The distance from aspiration to reality is at times overwhelming. However, at TKE inspired leadership, substantive strategy, and strong-minded commitment and discipline have always made that journey achievable.

To keep the Strategic Plan relevant and dynamic, a formal monitoring structure will be guided by:

- ▶ An Oversight Committee responsible for developing and guiding tactical action plans
- ▶ Integrated annual recalibration points to allow for course adjustments based on progress, patterns, and trends

At TKE, we never lose faith in the potential for being the best as we journey from great to exceptional. Being ‘quite good’ is not enough, pursuing excellence is the vision. Today, TKE continuously moves from good to great to exceptional with an unyielding commitment to its members and mission.

"The strategic planning process positions TKE to adapt to shifting demographics and social norms."
—Anonymous Survey Respondent



Our core assumption in this exhilarating and inclusive strategic planning process was to ensure TKE continues to be bold and ambitious yet remain anchored by its mission. TKE continues to adapt and evolve with confidence in a complex and rapidly changing world. The 2025-2030 Strategic Plan is a document that moves us toward that future.

We are deeply grateful for the support provided by the Grand Council, Foundation Board, Professional Staff, Alumni Volunteers and Chapter Leaders to create our new Strategic Plan.

TKE's potential is boundless—
and its value is timeless.

