

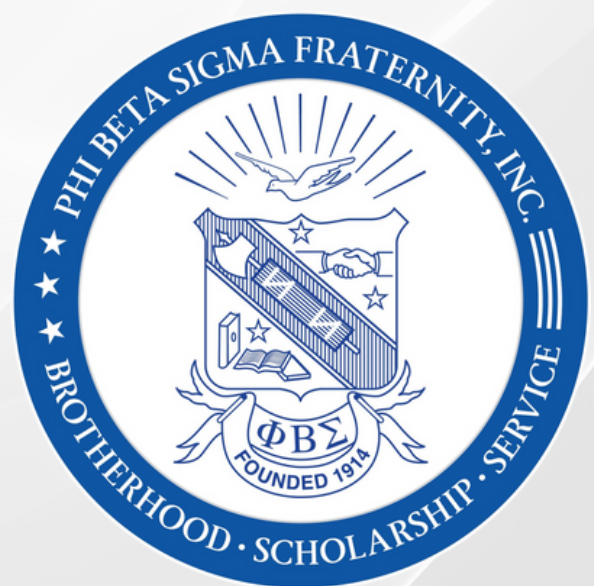


2040 IMPACT

STRATEGIC PLAN



www.phibetasigma1914.org



PHI BETA SIGMA FRATERNITY, INC.



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PRESIDENT'S MESSAGE

International President
Hon. Chris V. Rey, J.D.

Greetings to my fellow brothers of Phi Beta Sigma Fraternity, Inc., As the 36th International President of our esteemed Fraternity, I am honored to welcome you to view our 2023-2040 Strategic plan. I am proud to say that this plan is the result of the collective efforts of our brotherhood and represents our shared vision for the future.

I would like to extend a heartfelt thank you to each and every brother who participated in the strategic planning process. Your input and dedication have been instrumental in shaping the direction of our organization, and I am grateful for your commitment to our cause.

Our strategic plan focuses on four key pillars: membership, programs, technology and capital. We are committed to empowering generations of men to BELIEVE in our collective power to effect positive change in our communities and beyond. With this plan, we aim to build upon the rich legacy of Phi Beta Sigma and to continue to serve as a beacon of hope and inspiration for all. I encourage every brother to take the time to review our strategic plan and to determine how you can contribute to our collective success. As the African proverb goes, "It takes a village." We all have a role to play in achieving our goals and making a difference in the world.

Our administration is committed to enhancing the quality of life for our brotherhood while investing in our communities through active engagement and economic development. We believe that these pillars are essential to achieving our strategic goals and to making a lasting impact on the world around us.

As we move forward, I am committed to pushing our Fraternity to achieve at the highest levels. I believe that we can accomplish great things if we work together, support each other, and remain true to our values of culture for service and service for humanity. It's a new day in Phi Beta Sigma, and I am excited to be a part of this journey with you. Let us continue to BELIEVE in our collective power to effect positive change in the world.

Best Regards,

A stylized, handwritten signature in black ink that reads "Chris V. Rey". The signature is fluid and cursive, with a large, sweeping "C" and a prominent "R".

Hon. Chris V. Rey, J.D.



EXECUTIVE DIRECTOR'S MESSAGE

International Executive Director
Hon. Daryl A. Anderson Sr.

Greetings we are thrilled to introduce you to our 2023-2040 strategic plan for Phi Beta Sigma Fraternity, Incorporated. This plan outlines our vision for making a positive impact in our communities and the world, and we invite you to explore it in depth.

As we embark on this journey, we are grateful for the collective efforts of the brotherhood in shaping this strategic plan. It is through the diverse perspectives and shared commitment of our members that we are able to set and achieve our goals.

Our strategic plan focuses on impact and engaging with our communities. We believe that by centering our efforts around these areas, we can improve the lives of the people we serve and make a tangible difference in the world.

Furthermore, our strategic plan is particularly important when it comes to impacting the Black community. We recognize the unique challenges and struggles that our community faces and our plan aim to address them in a meaningful way. Our planning process was inclusive and afforded us the opportunity to gain the perspective of the brotherhood on how to continue the Fraternity toward meaningful impact.

In summary, our 2023-2040 strategic plan serves as a blueprint for future generations of Phi Beta Sigma men. With a focus on membership, programs, technology, and capital, we are committed to making a positive impact in our communities and the world. We are proud to have the collective efforts of the brotherhood in shaping this plan and look forward to achieving our goals together. By investing in our organization, we are investing in future generations of Phi Beta Sigma men who will continue our legacy of service and leadership.

Thank you for your continued commitment to Phi Beta Sigma and for being a part of the strategic planning process. Together, we can achieve our goals and make a lasting impact in the world.

Best Regards,

Hon. Daryl A. Anderson, Sr.



SECTION ONE:

The Brotherhood



“ Empowering Generations of Men to BELIEVE in Advocacy, Community Service, and Engagement ”

Who We Are

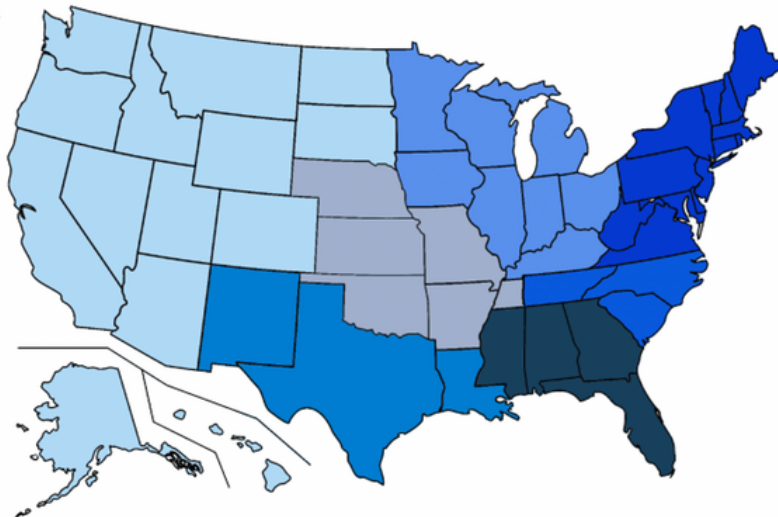
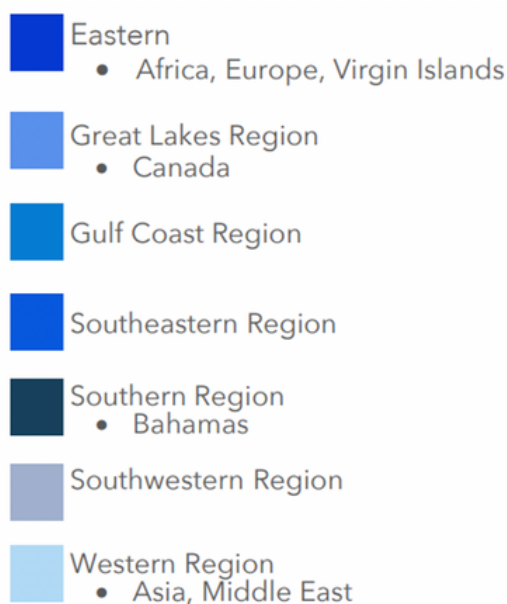
Mission

The brothers of Phi Beta Sigma are the Fraternity's most valuable resource and strength. They are the primary means by which the Phi Beta Sigma objectives will be achieved. In order to accomplish the Fraternity's objectives, it is essential that systems are instituted that effectively embody "Culture for Service and Service for Humanity" and promote brotherhood, scholarship, and service.

Where We Operate

Phi Beta Sigma Fraternity, Inc. is headquartered in Washington, D.C. at 145 Kennedy St NW. The Fraternity is divided into seven regions: Eastern, Great Lakes, Gulf Coast, South Eastern, Southern, Southwestern, and Western.

Phi Beta Sigma Fraternity, Inc. also has chapters in Africa, Europe, the Caribbean, Canada, Asia, and the Middle East.



“ Empowering Generations of Men to BELIEVE in Advocacy, Community Service, and Engagement ”

Our Core Values

As stated in *The Sigma Light*: The ideals of the Fraternity have been crystallized into three principles: The first is **BROTHERHOOD**. Ours is a brotherhood that calls for and gladly gives its best in the hour of need. It is a spiritual fellowship that binds us in all activities along life's narrow pathway. It rests upon the social welfare of each brother.

The second principle, **SERVICE**, is a keystone of all activities, the source of all joy, the basis of all happiness and the fountain of all love from which all mankind may drink. A fruitful life is one that is spent for the blessings of others. Members of the Fraternity should always be on the alert to find opportunities for service to the community and the Fraternity. The three great ideals of Phi Beta Sigma – Brotherhood, Scholarship, and Service – when interpreted in their fullest meaning became its philosophy. Giving those ideals practical meaning has made and must continue to make Phi Beta Sigma a great and dynamic Fraternity.

The third principle, **SCHOLARSHIP**, is highly esteemed as a necessary development for a keep precept of sound judgement. Scholarship not only expresses itself in the acquisition of a superior mind, but also in superior character. The ideal of scholarship should ever be kept uppermost in our minds so that we may be a beacon of light among men.



2022 Southern Regional Conference

“ Culture for Service and Service for Humanity ”

AN INTERNATIONAL ORGANIZATION

Phi Beta Sigma Fraternity, Inc., is an International organization comprised of 225,000 college-educated men, and built primarily on the ideology of promoting Brotherhood, Scholarship and Service. Over its one hundred plus years of existence, the Fraternity has focused on improving the global community through dedicated service.

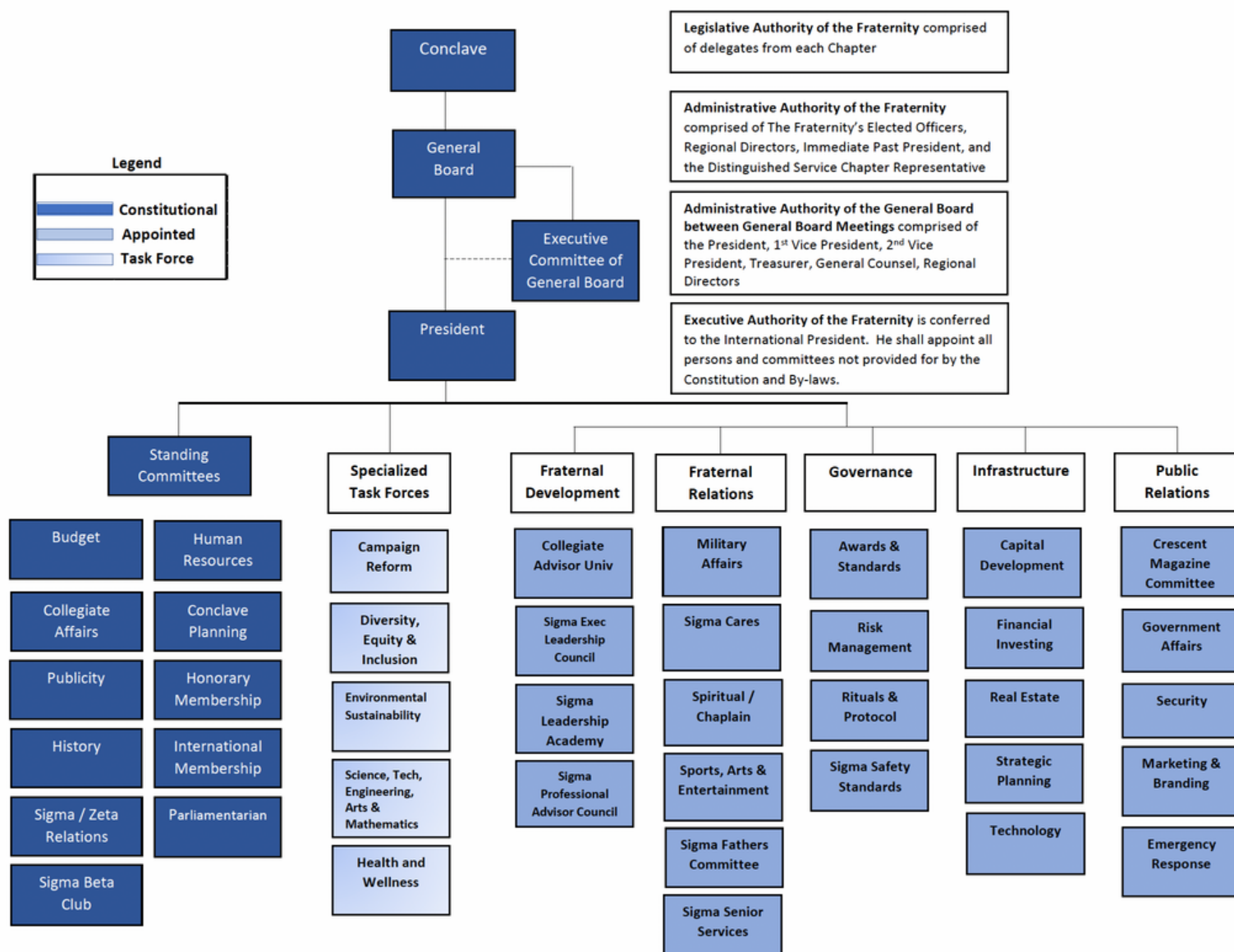
The role of the International leadership team for Phi Beta Sigma Fraternity, Incorporated is to provide strategic direction, guidance, and support to the organization's members, chapters, and programs worldwide. The team is responsible for ensuring that the Fraternity's mission, vision, and values are upheld, and that its operations align with its strategic plan and goals.

The International leadership team includes the Executive Director, who serves as the Chief Operating Officer of the organization, and the International Board of Directors, which is responsible for setting policy, establishing guidelines, and ensuring that the organization's finances and resources are managed effectively. In addition, the team includes various committees and task forces that oversee specific areas of the organization, such as membership, programs, technology, and capital.

The team is accountable to the Fraternity's members, who elect the International Officers and General Board, and to the broader community it serves. It works closely with the Fraternity's chapters and members to ensure that their needs are met and that they have the resources and support necessary to carry out the organization's mission and goals. Ultimately, the International leadership team is responsible for leading Phi Beta Sigma Fraternity into the future and ensuring that it continues to make a positive impact in the communities it serves.



ORGANIZATIONAL STRUCTURE



ΦΒΣ

“

Thought without practice is empty and
action without thought is blind.
~ Bro. Kwame Nkrumah

”



OUR HISTORY

Phi Beta Sigma Fraternity, Inc was founded on January 9, 1914, on the campus of Howard University in Washington, D.C. The Fraternity was founded by A. Langston Taylor, Leonard F. Morse, and Charles I. Brown. The path toward the establishment of a new Fraternity at Howard began on Saturday, October 18, 1913, when Bro. Taylor presented to Bro. Morse the idea of founding a new Fraternity. Bros. Taylor and Morse invited Bro. Brown to join the movement. They began meeting weekly to push the idea forward.

The Founders carefully considered and selected 9 other men and invited them to join as charter members. On Friday, January 9, 1914, the group met at the 12th Street Branch of the Y.M.C.A. to consider establishing a new Fraternity. Bro. Taylor, who was Chairman of the Organizing Committee, reported on the concepts which led to the idea of forming a new Fraternity to the 9 men and two remaining founders. He concluded his presentation with the formal recommendation that the new organization, which would be called Phi Beta Sigma, be formed. Bro. Brown made a motion, which was seconded by William F. Vincent. This cleared the path to a unanimous vote of acceptance. It was at this moment that Phi Beta Sigma was born. Following this meeting, a petition was drawn and presented to the Board of Deans at Howard University. On April 15, 1914, the petition was granted, and the charter was approved.

The first initiation of the Alpha Chapter took place on May 4, 1914, at which time 14 candidates were initiated. The first initiate was Abraham McCartney Walker, who upon being initiated stated "I believe in all that Phi Beta Sigma represents, and I will herald and defend it even against the world."

Over 100 years later, Phi Beta Sigma Fraternity has grown exponentially. Phi Beta Sigma Fraternity, Inc. serves through a membership of over 225,000 men across 700 chapters in the U.S. Europe, Asia, Africa, and the Caribbean.



The Need

There is a need for programs and services that impact Black men and their families Internationally. Black men, and people of color more broadly, often face systemic barriers and inequalities that affect their ability to thrive and succeed. This is true not just in the United States, but in many countries around the world.

As a Fraternity founded on the principles of **Brotherhood, Scholarship, and Service**, Phi Beta Sigma Fraternity, Inc. is uniquely positioned to meet this need. Our International organization has a long-standing commitment to serving our communities and making a positive impact in the lives of Black men and their families.

In addition to our existing programs, an analysis of our strengths, weaknesses, opportunities, and threats identified the need to strengthen our partnerships with local organizations and community leaders to address specific issues facing Black men and their families in different regions of the world.



2023 MLK Day of Service - Alpha Nu Sigma, Gamma Phi Sigma, and Iota Alpha Sigma chapters



SECTION TWO:

Impact 2040

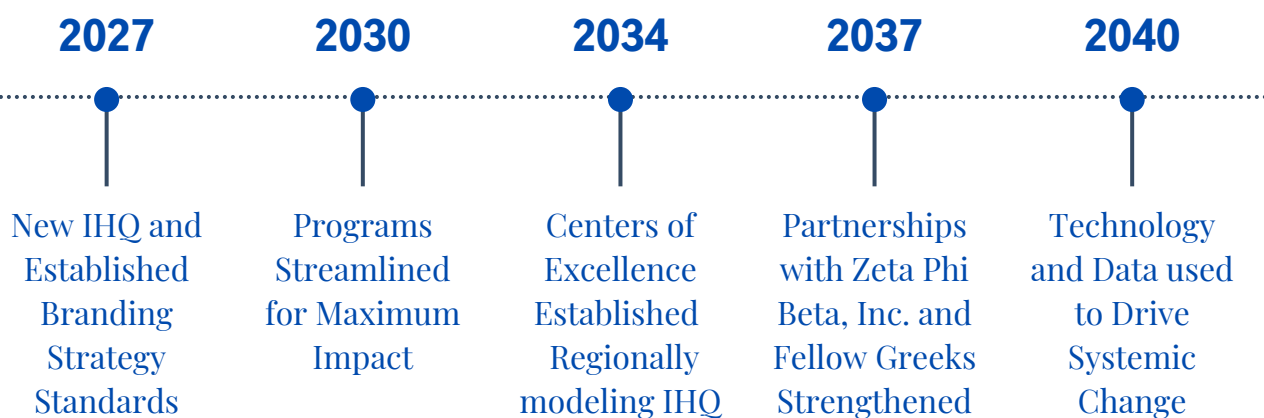


“

Where there is no vision, there is no hope.
~ Bro. George Washington Carver

”

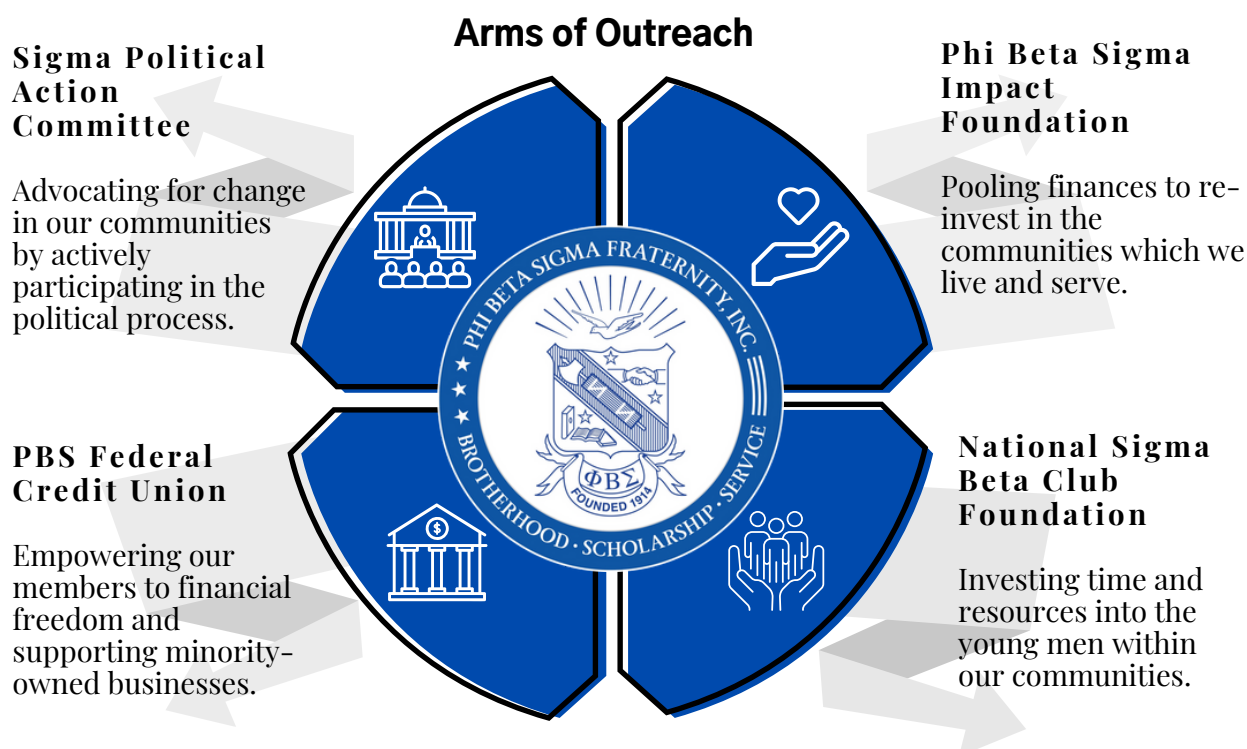
The Next 17 Years



Maximizing Our Impact

Brotherhood is a central tenet of Phi Beta Sigma, and the Fraternity can use this principle to maximize impact while building strong relationships in the communities served by the Fraternity. By creating a sense of brotherhood and camaraderie among its members, Phi Beta Sigma can inspire others to work together towards common goals. This can be achieved through activities such as mentoring programs, community service projects, and networking events.

During this planning period, the goal of the Fraternity is to establish itself as the leading organization driving “Measurable” change that disrupts systemic racism and inequality within the Black community. Leveraging Phi Beta Sigma’s Brotherhood and strong relationships we aim to do this through our arms of outreach.



2040 Priorities



Membership

Strengthening the quality, quantity, and satisfaction of the brotherhood.



Programs

Establishing the Fraternity as a change agent in all program areas.



Technology

Strengthen technological literacy and utilization to better serve the brotherhood and the community.



Capital

Increase capital investments and value within the community.

“

Words are not enough. We need real action
and meaningful reform.
~ Bro. Elijah Cummings

”

Focus Area One: Economic Development

Economic development programs have the potential to address systemic inequalities and promote economic mobility in the Black community. Historically, Black communities have faced significant barriers to economic success, including discrimination, lack of access to capital and resources, and unequal opportunities for education and employment. Economic development programs can help address these challenges by providing training, resources, and support for Black-owned businesses, as well as promoting job creation and career development in Black communities.

Bigger Better Business

Bigger and Better Business (BBB) became the first international program of Phi Beta Sigma Fraternity. It was first introduced at the Tenth Anniversary Conclave, in Philadelphia, Pennsylvania (December 1924). When Bigger and Better Business was adopted as an international program, special emphasis was placed on encouraging and promoting Negro businesses. At its inception, the program sought to encourage Negro businesses to improve their business acumen, efficiency, service to the public and to be competitive with other businesses. Initiatives associated with BBB include Black Spend and Adopt-a-Business.

International Centers of Excellence

International Centers of Excellence are dedicated to promoting the social, economic, and cultural well-being of the Black community. The International Headquarters has begun the process of establishing a model center. This location offers strategic capital investments to provide an avenue for affordable housing, small business developments, job training, and community organizing. The Centers of Excellence will work in partnership with government agencies, community organizations, and private sector stakeholders to address complex issues such as poverty, economic inequality, and social exclusion. During this planning period, Phi Beta Sigma Fraternity, Inc. aims to establish a Center of Excellence in each of its seven regions.



Rendering of Proposed Office Space and Development for the National Center of Excellence.

Focus Area Two: Social Action

Formed in 1934, Social Action was a program that was conceived by Bro. Elmo M. Anderson to focus on improving the general wellbeing of disenfranchised people. Social Action programs and initiatives can help disrupt systemic racism in the Black community by promoting greater awareness and understanding of issues related to race, inequality, and social justice. They can mobilize individuals and communities to act against systemic racism through advocacy, community organizing, and civic engagement. By raising awareness and promoting dialogue around issues such as police brutality, mass incarceration, and housing discrimination, healthcare access, and much more Social Action programs can help promote greater understanding and empathy across racial lines and drive positive social change. During this planning period, Phi Beta Sigma Fraternity, Inc. developed a logic model which has established Social Action as an area of focus comprised of one evidence-based program called The Sigma Collective.

The Sigma Collective

The Sigma Collective is modeled after the collective impact process. This process is a research-based way to achieve its social action goals by establishing shared measurements that address complex social issues. By engaging in a collaborative and coordinated effort, the Fraternity can leverage its collective resources, expertise, and networks to achieve greater impact. Led by the International Director of Social Action, the Sigma Collective is comprised of each of the seven regional Social Action Directors. This group will meet monthly to monitor and track results within the four initiatives listed in the International Social Action Plan. Quarterly, the results of this data will be relayed Internationally to the Brotherhood. The shared vision of the Sigma Collective Initiatives are to disrupt systemic and structural racism while increasing success within the Black community through the initiatives listed on page 19.



2022 Back to School Supply Drive - Alpha Beta Sigma Chapter

Focus Area Three: Education

Education programs can have a transformative impact on the Black community by addressing systemic inequalities and promoting academic achievement and economic mobility.

Historically, Black students have faced significant barriers to educational success, including discrimination, underfunded schools, and lack of access to resources and opportunities. During the 1945 Conclave in St. Louis, Missouri, the Fraternity engaged in a restructuring of its programming, leading to the birth of Education as an International program. Within this planning period, the Phi Beta Sigma Fraternity will establish impact in two key programs, College Prep and Leader in Me.

College Prep

Phi Beta Sigma Fraternity, Inc. college prep programs are educational initiatives designed to help high school students prepare for admission to college. These programs will offer resources such as college counseling, test preparation, and academic support to help students navigate the college application process and succeed academically. The Fraternity will also provide guidance on financial aid and scholarship opportunities, as well as opportunities for students to visit college campuses and engage with current college students. Overall, these programs aim to increase access to higher education and promote greater equity and opportunity for all Black students, regardless of their socio-economic background or academic history.

Leader in Me

Utilizing the evidence-based Leader in Me curriculum, the Fraternity is able to partner with schools to offer a series of workshops to students during or after school. Leader in Me is a K-12 whole-school improvement model that empowers students with the leadership and life skills they need to thrive in the 21st century. Grounded in the 7 Habits of Highly Effective People® by Stephen R. Covey, students are first taught to “lead themselves” through personal responsibility, planning, and decision making, then to “lead others” through attentive listening, conflict resolution, and teamwork. In addition to the 7 Habits, Leader in Me also teaches the 4 Disciplines of Execution®, a set of practices that target focus, accountability, and goal achievement.



Delta Sigma Chapter's Daryl A. Prince Sr. Scholarship presentation.

Focus Area Four: Mentoring

Mentoring programs are initiatives that are grounded in research and have been shown to be effective in promoting positive outcomes for young people of color. These programs typically involve pairing youth with caring and supportive adult mentors who provide guidance and support in areas such as education, career development, and social-emotional well-being. Evidence-based mentoring programs have been shown to be effective in promoting positive youth development outcomes, such as improved academic achievement, increased self-esteem, confidence and reduced risky behavior.

Sigma Beta Club

In the early 1950s, Phi Beta Sigma Fraternity became the first Greek organization to establish a youth auxiliary group. Under the direction of Bro. Dr. Parlett L. Moore, while serving as an International Education Director, the Sigma Beta Club was founded. Brother Moore was concerned with changing needs in our communities and recognized the important role that Sigma men could play in the lives of our youth. Sigma Beta Clubs all across the country have mentored thousands of young men since 1950. Participants learn the importance of servicing others and establish lifelong friendships, as well as the enhancement of meaningful educational and professional opportunities.



Sigma Collective Initiatives

1

Healthy Communities

To eliminate health disparities, achieve health equity, and attain health literacy to improve the health and well-being of the Black community. KPIs are closely tied to the social determinants of health (i.e., structural racism or systemic bias that may affect health literacy and contribute to health disparities).

2

Brotherhood for Justice Reform

To create a fair justice system for Black communities these KPIs are closely tied to promising practices that lead to equitable justice systems. Black men and women are incarcerated in state prisons at five times the rate of whites. Black men face disproportionately harsh incarceration experiences as compared with prisoners of other races. Racial disparities are also noticeable with Black youth, as evidenced by the school-to-prison pipeline and higher rates of incarceration for Black juveniles.

3

Voting Empowerment

Voting is a critical tool for advancing the Black community. By ensuring that Black individuals have access to the ballot box and are empowered to use their voices to shape the policies and practices that impact our lives, we can work towards eliminating disparities and achieving justice and equality. These KPIs are related to efforts made through the Sigma Collective's social action activities at the local, regional, and international level.

4

Safe Communities

The Safe Community Initiative aims to create safe, supportive, and thriving communities within Black neighborhoods. At the heart of this initiative is a commitment to addressing the root causes of violence and crime. We recognize that many of the social determinants of health, such as poverty, lack of access to quality education and healthcare, and systemic racism, contribute to higher rates of violence and crime in Black communities. Therefore, our approach to creating safer communities is holistic and multifaceted, focusing on both prevention and intervention strategies.

“

Get in good trouble, necessary trouble, and help redeem the soul of the nation.

”

~ Bro. John Lewis



SECTION THREE:

The Plan



2020 African Chapter Chartered - Sigma Mu Sigma

“ We face neither East nor West; We face forward. ”
~ Bro. Kwame Nkrumah

The Process

The International team of Phi Beta Sigma Fraternity, Inc. formed a strategic planning committee to establish the fifteen-year direction of the Fraternity. This was a comprehensive process that solicited the input of the Brotherhood during a strategy session in Philadelphia in the Summer of 2022. During this session individuals were walked through a thorough analysis of the organization's current situation, including its strengths, weaknesses, opportunities, and threats. Once the analysis was complete, the strategic planning committee identified the core focus areas which guided the development of the strategic plan.



The four priorities identified during the planning process were membership, programs, technology, and capital. These priorities aided in establishing clear goals, objectives, and measures within the strategic plan. Over the next seventeen years our aim is to establish a legacy of impact.



2022 Crescent Legacy of Leaders



STRATEGIC GOALS

Strengthen the quality, quantity, and satisfaction of the brotherhood.

MEMBERSHIP



Alpha Chapter, Howard University

- G1.1** Increase the number and quality of qualified undergraduate and graduate recruits into Phi Beta Sigma Fraternity, Inc. of double the financial membership by the end of FY2040
- G1.2** Maintain the retention of members in Phi Beta Sigma Fraternity, Inc. at both undergraduate and alumni levels above 90% by the end of FY2040
- G1.3** Increase the collegiate transfer rate of members into alumni chapters of Phi Beta Sigma Fraternity, Inc. above 90% by the end of FY2040

1.1 Develop and implement a branding and marketing strategy that embraces our service history while improving consistency across digital and written communication (i.e., websites, social media, and similar).

Key Performance Indicators

- Written branding and marketing strategy
- + Social media KPI's
- + Brand exposure in other marketing platforms (e.g., radio, television, print media, and etc.)
- + Brand exposure in other geographies to expand the global footprint

1.2 Develop and implement a branding curriculum and standards to post on the Phi Beta Sigma Fraternity, Inc. Learning Management System (LMS).

Key Performance Indicators

- Written branding curriculum around branding standards and exposure posted on LMS
- # of members trained
- # of training hours

1.3 Establishing a target membership goals based on demographic and market opportunity.

Key Performance Indicators

- Written membership growth plan
- + Percentage of prospect engagement within target market
- Informational attendance at double the chapter size
- # of Sigma Beta Club Mentees who become Phi Beta Sigma Fraternity, Inc. members

1.4 Eliminating hazing and undocumented members.

Key Performance Indicators

- Above 75% of members who are MIP certified
- 100% of members who are risk management certified
- Zero hazing incidents
- Zero undocumented members

1.5 Establish a process to measure membership engagement and factors affecting retention.

Key Performance Indicators

- Written process to measure membership engagement and factors affecting retention
- 50% improvement from baseline measurement

1.6 Establish an academy curriculum to better prepare members for leadership roles.

Key Performance Indicators

- Written SOP and training curriculum
- # of training hours tracked
- # of interested members trained
- Satisfaction surveys of program
- # Changes implemented based on satisfaction surveys

1.7 Develop and implement best practices around creating and maintaining chapter environments that promote dignity and respect within the brotherhood.

Key Performance Indicators

- Written best practices
- Chapter level engagement survey
- # of training hours tracked
- # of members trained



Alpha Omega Sigma Chapter - Seoul, South Korea



STRATEGIC GOALS

Evaluate, strengthen, and modernize programs and services.

PROGRAMS

2



2022 Phi Beta Sigma Fraternity - Virtual Career Fair

G2.1 To establish Phi Beta Sigma Fraternity, Inc as a change agent for the economic success of Black communities by the end of FY2040.

G2.2 To establish Phi Beta Sigma Fraternity, Inc as a change agent that increases educational success and college mobility of African American students by the end of FY2040.

G2.3 To establish Phi Beta Sigma Fraternity, Inc as a change agent that ensures young Black males between the ages of 8 and 18 lead successful lives by the end of FY2040.

G2.4 To establish Phi Beta Sigma Fraternity, Inc as a change agent that disrupts systemic and structural racism while increasing success in the Black community by the end of FY2040.



OBJECTIVES - ECONOMIC DEVELOPMENT

2.1 Revise the program implementation guide to include economic development as a data-driven focus area that houses the Fraternity's Bigger Better Business (BBB) and Centers of Excellence programs

Key Performance Indicators

- Revised implementation guide

2.2 Establish a relationship with the international Economic Development Administration and other federal agency program offerings (i.e., Economic Justice Assistance, Regional Technology Innovation Hubs, STEM Talent Challenge, Choice, and Promise Neighborhoods, etc.)

Key Performance Indicators

- # New partnerships established
- # of partnership meetings

2.3 Develop and establish written guidelines and protocols for regional and international centers of excellence and add them to the program implementation guide and/or PBSI Economic Development plan

Key Performance Indicators

- Revised implementation guide
- International and Regional Center of Excellence plans

2.4 Establish and implement real estate development plan to increase investment opportunities within low-income communities surrounding the Regional Centers of Excellence

Key Performance Indicators

- International Real-estate expansion plan
- Regional Real-estate expansion plans
- # of real-estate investments at international and regional levels



OBJECTIVES - ECONOMIC DEVELOPMENT

2.5 Develop and implement internal and external program satisfaction surveys and a process of feedback from members, community residents, and partners.

Key Performance Indicators

- New satisfaction surveys
- Written process

2.6 Explore the opportunity to expand the PBSFCU to local and regional communities within a newly established Economic Development Plan

Key Performance Indicators

- Written PBSFCU expansion plan
- # New PBSFCU's branches opened
- # New member served

2.7 Develop and implement a curriculum and standards to educate the brotherhood on the data-driven economic development focus and its programs

Key Performance Indicators

- Written training program
- Training videos posted to LMS
- # Members trained
- Training surveys

2.8 Partner with local Community Development Centers on opportunities that offer investment (i.e., economic, educational, and health).

Key Performance Indicators

- # New partners established
- # Partnership meetings



OBJECTIVES - ECONOMIC DEVELOPMENT

2.9 Establish a baseline of impact data to measure the impact of the economic development program

Key Performance Indicators

- # of affordable housing units created
- # of families served
- # and amount and type of PBSFCU loans
- Amount of financial investment within the local, regional, and international communities

2.10 Track data in the newly acquired technology system

Key Performance Indicators

- Data tracked in www.truimpact.com or similar system acquired



2.11

Revise the program implementation guide to include social action as a data-driven focus area that houses the Fraternity's Sigma Collective program

Key Performance Indicators

- Revised implementation guide

2.12

Develop and implement internal and external program satisfaction surveys and a process of feedback from members, and partners that correlate to logic model outcomes

Key Performance Indicators

- New satisfaction surveys
- Written processes

2.13

Develop and implement a curriculum and standards to educate the brotherhood on the data-driven social action focus and its programs

Key Performance Indicators

- Program training curriculum
- Training videos posted to LMS
- # of training hours tracked
- # Members trained

2.14

Acquire technology systems and a collective process to support the Sigma Collective Initiatives

Key Performance Indicators

- Technology systems purchase (e.g., www.trueimpact.com and www.quorum.us)
- # Monthly meetings with regional directors
- # Quarterly meetings with Brotherhood



2.15 Collect data to support the “Healthy Communities” initiative

Key Performance Indicators

- # of vulnerable populations who received access to health care (e.g., healthcare, mental health or substance misuse related services)
- # Individuals reached at health and/or mental health education events
- # of individuals screened
- # of meals or food provided
- # of clean water solutions provided
- # of health related partnerships that you worked with at your event
- Report the social vulnerability index of the location of the event

2.16 Collect data to support the “Brotherhood for Justice Reform” initiative

Key Performance Indicators

- # and amount of individuals who participated in re-entry activities
- # of events that support justice reform initiative (e.g., political, educational, and economic equality of rights)
- # of events that support the elimination of race-base discrimination
- # of related engagement activities PLUS the number of Brothers (e.g., meetings held, agenda items addressed, politicians visited) conducted during Sigma Day at the Capital or Blue & White Legislative Day events
- # of criminal record expungement activities
- # of partnership engagement events with organizations that support the political, educational, social, and economic equality of rights of all persons

2.17 Collect data to support the “Voting Empowerment” initiative

Key Performance Indicators

- # of voting education, registration, and mobilization events
- # of new polling locations added to the minority communities
- # Individuals who attended voter education and outreach events
- # of voting policies changed at the state, local level
- # of related engagement activities PLUS the number of Brothers (e.g., meetings held, agenda items addressed, politicians visited) conducted during Sigma Day at the Capital or Blue & White Legislative Day events
- # of partnership engagement events with organizations that support fair and equitable voting rights for all persons

2.18

Collect data to support the “Safe Communities” initiative

Key Performance Indicators

- # and amount of participants who attended anti-violence/bullying events
- # and amount of participants who attend police engagement events coordinated by the Brotherhood
- # and amount of individuals who attended gun safety events
- # and amount of individuals who attended a community policing facilitated by the Brotherhood



2022 NPHC Fraternity Day on the Hill - Kappa Omicron Chapter



2.19 Revise the program implementation guide to include education as a data-driven focus area that houses the Fraternity's Adopt a School College Preparatory and Leader in Me programs

Key Performance Indicators

- Revised implementation guide

2.20 Establish a relationship with the international Department of Education and other federal agency program offerings (i.e., Office of Elementary and Secondary Education, Office of Postsecondary Education, Office of Special Education Rehabilitation Services

Key Performance Indicators

- New partnerships established
- # Partnership meetings

2.21 Develop and implement internal and external program satisfaction surveys and a process of feedback from members, students, and partners

Key Performance Indicators

- New satisfaction surveys
- Written processes

2.22 Develop and implement a curriculum and standards to educate the brotherhood on the data-driven education focus and its programs

Key Performance Indicators

- Program training curriculum
- Training videos posted to LMS
- # of training hours tracked
- # Members trained



2.23

Partner with local schools and community organizations on opportunities increase support to college prep program areas identified in the program outline (i.e., college workshops, ACT/SAT Prep, study skills, STEM and STEAM).

Key Performance Indicators

- # School partnership meetings
- # New partners established
- # College prep program events
- # Students served at each event

2.24

Develop pre and post assessments for applicable college prep programs that correlate to short and long-term outcomes in the logic model.

Key Performance Indicators

- New pre and post assessments
- # of assessments administered
- Pre and post test scores

2.25

Establish the evidence-based Leader in Me program and update the implementation guide.

Key Performance Indicators

- New program updated in the program implementation guide
- # of program events
- # of students served at each event
- Pre and post assessments



2021 Virginia State University \$25,000 Scholarship - Alpha Alpha Alpha Chapter

- 2.26** Revise the program implementation guide to include mentoring as a data-driven focus area that houses the Fraternity's evidence-based Sigma Beta Club program and its core program components (i.e., recruitment, screening, training, matching, and initiating Rise and Thunder Curriculum, monitoring, and closure)

Key Performance Indicators

- Revised implementation guide

- 2.27** Establish a relationship with the International Mentoring Partnership
- Key Performance Indicators**

- New partnerships established
- # Partnership meetings

- 2.28** Develop and implement a curriculum and standards to educate the brotherhood on the data-driven education focus and its program

Key Performance Indicators

- Program training curriculum
- Training videos posted to LMS
- # of training hours tracked
- # Members trained

- 2.29** Partner with local schools, churches and community organizations on opportunities increase support to support the Sigma Beta Club program.

Key Performance Indicators

- New partnerships established
- # Partnership meetings



2.30 Develop pre and post assessments for applicable Sigma Beta Club programs that correlate to short and long-term outcomes in the logic model.

Key Performance Indicators

- Pre and post assessments
- # assessments administered
- Pre and post test scores

2.31 Establish a baseline of impact data to measure the impact of the Sigma Beta Club Program

Key Performance Indicators

- # of Mentees
- # of Mentees who receive scholarships
- # of Mentees who attend college
- # of Mentees that graduate from college
- # of Mentees that obtain full-time jobs after college
- # of Mentees who become Phi Beta Sigma Fraternity, Inc. Members
- # of Mentoring hours

2.32 Track data in the newly acquired technology system

Key Performance Indicators

- Data tracked in www.truimpact.com or similar acquired system



Spelling Bee - Nu Eta Sigma Chapter, Tokyo Japan



STRATEGIC GOALS

Strengthen technological literacy and utilization to better serve the brotherhood.

TECHNOLOGY

3



2020 Southwestern Region STEM Competition

G3.1 Establish and implement technology development, education, and utilization plan by the end of FY2040

- 3.1** Hire a Project Manager to work with the Director of Technology and Manager's to develop a technology plan and provide strategic direction and lead the implementation of technology investments.

Key Performance Indicators

- New Technology Project Manager
- Technology Implementation Plan (TIP)

- 3.2** Identify strengths and weaknesses within Phi Beta Sigma Fraternity's current technological infrastructure (i.e., websites, LMS, BluPrint, PBS App, PBSFCU, etc.)

Key Performance Indicators

- Strengths and weaknesses identified in the TIP

- 3.3** Identify and purchase technology tools and infrastructure that continue to protect proprietary assets while allowing space for growth.

Key Performance Indicators

- Tools identified in the TIP
- Purchased technology

- 3.4** Develop and implement a technology literacy curriculum and standards to educate the brotherhood through live trainings as well as post on the Phi Beta Sigma Fraternity, Inc Learning Management System

Key Performance Indicators

- Training curriculum posted in LMS
- Training videos posted in LMS
- # Training hours tracked
- # Members trained



3.5 Develop technology goals and incentives to encourage utilization.

Key Performance Indicators

- Goals identified in TIP

3.6 Purchase technology tools to support data collection for all programs including the Sigma Collective

Key Performance Indicators

- Technology system purchase for programs (www.trueimpact.com)
- Technology system purchased to collect data for Sigma Collective (www.quorum.us)



2023 STEM Day - Alpha Beta Sigma Chapter



STRATEGIC GOAL

Increase organizational investment and value in the community.

CAPITAL

4



G4.1 Establish Phi Beta Sigma Fraternity, Inc. as a mission-related investment organization by the end of FY2040

G4.2 Increase the social and financial impact of Phi Beta Sigma Fraternity, Inc. programs and services by the end of FY2040

4.1

Work with an investment manager to develop and implement an investment plan that incorporates options for the foundation (i.e., stocks, endowments, and crypto currency) as well as increasing the lending power of the PBSFCU

Key Performance Indicators

- Written investment plan

4.2

Explore the opportunity to provide high impact venture capital funding into vetted business opportunities

Key Performance Indicators

- Business investment opportunities identified in the investment plan.

4.3

Partner with local and regional economic development organization on grant opportunities (i.e., ACF Community Economic Development, EDA, etc.)

Key Performance Indicators

- New partnerships established
- # Partnership meetings
- Funded grant proposals

4.4

Establish and implement capital campaign while leveraging membership equity and celebrity capital

Key Performance Indicators

- Established capital campaigns
- Secured funds
- # Celebrity resources and/or investors



4.5 Identify real estate and affordable housing investment strategies within the Centers of Excellence that correlate with community revitalization goals identified in the economic development logic model

Key Performance Indicators

- Real estate and affordable housing investment opportunities within the investment plan

4.6 Identify local and regional tax incentives and special purchasing options for organizations investing in low-income communities.

Key Performance Indicators

- Incentives and purchasing options within the investment plan

4.7 Develop and post best practices in LMS to support local chapters with working with fellow Greek-letter organizations and other community partners

Key Performance Indicators

- Written SOP or best practice briefs posted in LMS

4.8 Develop a database of international partnerships as well as best practices on how to cultivate and nurture partnerships at the local level (e.g., Urban League, NAACP, UNCF, Communities in Schools, Covenant House, etc)

Key Performance Indicators

- Written SOP or best practice briefs posted in LMS



4.9

Increase the number of engagement activities focused and committed to service across the Phi Beta Sigma Fraternity, Inc. footprint specifically with Zeta Phi Beta Sorority Inc. and fellow Greek organizations.

Key Performance Indicators

- # Engagement activities focused and committed to service
- # of service hours

4.10

Develop a baseline and track philanthropic and government funds that support programs across all areas.

Key Performance Indicators

- Process to track funding dedicated to support programs in all four areas
- Amount of grant funds secured
- Amount of fundraising dollars secured
- Amount of in-kind support (e.g., free building space, items donated, etc)



2020 Zeta Phi Beta, Inc. and Phi Beta Sigma Fraternity, Inc. Cruise

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