
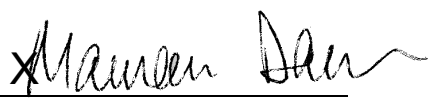


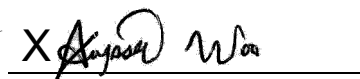
# Five-Year Strategic Plan

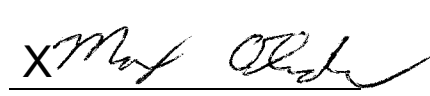
Tau Beta Pi Michigan Gamma (Adopted 12 of Dec. 2015)

*To encourage continued growth, focused efforts, and continuous improvement to projects, the Advisory Board of the Michigan Gamma Chapter of Tau Beta Pi sets forth this strategic plan to guide the efforts of the chapter. The goals outlined here are intended to serve as a guiding trajectory for the organization. Changes to the college landscape or to the organization will, of course, necessitate changes to the plan; but it is our belief at the time of writing that by following the trajectory laid out, the organization will be able to increase its membership, improve its projects, and create a better sense of community for members.*

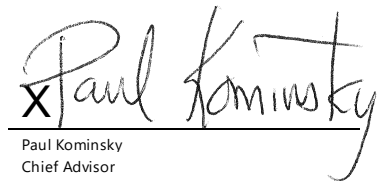
  
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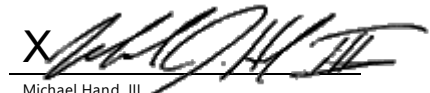
  
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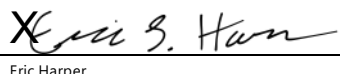
  
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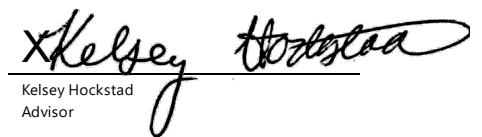
  
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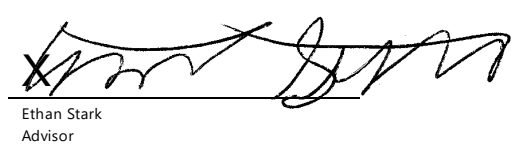
  
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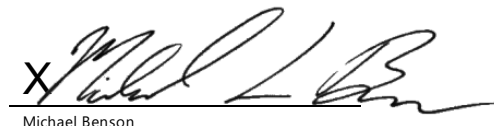
  
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## 1. OVERVIEW

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The strategic plan for the organization was divided into seven key areas. These areas are

1. Membership and Alumni
2. Events
3. Chapter Reputation and Image
4. Signature Events
5. TBP Beyond U of M
6. Chapter Leadership
7. Chapter Operations

Many recommendations speak to goals that something should happen “each semester” or “every year”. In the context of this plan, it is understood that the meaning is that these things should be happening with regularity within five years or sooner.

## 2. MEMBERSHIP AND ALUMNI

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The primary responsibility of any chapter of Tau Beta Pi is to identify and initiate new members of the organization. What separates chapters that are surviving and chapters that are thriving is, fundamentally, the level of activity in which their members are engaged. While the primary area of chapter membership is with the students still on campus, the chapter holds to the saying “once a member, always a member” and thus the chapter should work to actively engage alumni and current students alike. Over the next five years, the chapter will focus on assisting the transition from electee to active member, improving alumni relations, fostering a large community of engaged active members, and increasing transparency of the chapter leadership.

### 1. ELECTEE TO ACTIVE TRANSITION

Ensuring a smooth transition from being an electee to being an active member within the chapter is of central importance to the life and activity of the chapter. The first step in ensuring that electees may enter in to the full participation of the chapter is to ensure that they complete the process of initiation. To that end the chapter should explore means by which it be possible that at least 90% of those who begin the process of electing are initiated at the semester’s conclusion. The chapter should also continually work to increase the number of eligible students who attend the informational meetings at the beginning of the semester. In addition to policy and requirements changes, the chapter should give ample consideration to initiatives that create a greater sense of community among candidates for membership.

Currently, a number of initiates cease or significantly reduce their participation in the chapter. Efforts should be made to actively engage these members, particularly in the months immediately following their initiation. The most obvious means to accomplish this is by leveraging the electee team structure to be a conduit by which they can find a smaller community within the chapter even after initiation. Encouraging new members to become actively engaged in some facet of chapter leadership is another great avenue for members to stay involved. It is important, therefore, that the leadership opportunities within the chapter never be fully static, but evolve to continually meet the needs and goals of its members. The chapter should, at minimum, work to ensure that at least 80% of members who remain on campus similarly remain active in the chapter.

### 2. ALUMNI RELATIONS

Analogous to the transition from electee to active is the transition from being a student member to being an alumni member. In keeping with the adage “once a member, always a member,” Michigan Gamma should seek to be a leader in the area of alumni engagement. Interaction with the local alumni chapter should be ongoing and include at least one joint event each semester. The chapter should also explore means of engaging MI-G alumni who do not live in the area. These means could include such initiatives as improved record keeping, mentoring programs, or better publication of relevant events to local and chapter alumni.

### 3. FOSTERING A COMMUNITY OF ENGAGED ACTIVES

Active participation is paramount to the success of the chapter. Working to ensure as many actives as possible are as engaged in the chapter as possible is vital to the long-term health and growth of the chapter. While the mission of the chapter remains first and foremost to initiate new members, that mission can only be most successful when the chapter is similarly prioritizing the needs and interests of its initiated members. The more engaged the active body is, the easier the pitch to join is made.

To that end, the chapter ought to explore numerous means to increase engagement among ever more of its initiated members. These means could include greater networking among members (both within MI-G and with members of other chapters), encouraging greater active attendance at officer or team meetings, and continuously improving the semester programming to better balance the needs and interests of initiated members and electees.

### 4. INCREASING TRANSPARENCY

Increased engagement within the chapter necessitates a strong sense of ownership in the chapter affairs. In organizations with large and healthy leadership structures, the temptation is present to abstract most of the decision making and vision away from the general members. While it is not necessary to actively engage the general membership in the day-to-day management of the chapter, it is important that those members who wish to be apprised of the goings on have the opportunity to be. This necessitates that the chapter prioritize transparency in its doings as much as possible. This can be accomplished through thorough and accessible minutes, open and advertised officer and team meetings, and by limiting the amount of collective decisions made outside of such formal settings.

### 3. EVENTS

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Engagement of members, either active or electee, is impossible without events and programming in which to be engaged. While the chapter currently enjoys a large number of vibrant events, continuous evaluation and improvement of those events is necessary to ensure that the offerings continue to provide the greatest amount of engagement and interest to participants.

#### 1. LARGE-SCALE OUTREACH EVENT

For many years, the chapter has focused primarily on small-scale community service events. These experiences are of course important to the well-rounded engineer, but they often fall short of the opportunity to have the greatest impact with the unique skills that engineers enjoy. The K-12 Outreach Program was created to address some of these concerns. Through it, members are able to use their aptitude and passion for technical subjects to help promote STEM fields to younger generations. MI-G should continue to explore ways to expand the K-12 Outreach offerings to more students and to more grades, particularly through larger-scale, higher-impact events.

#### 2. EXPANDED SOCIAL EVENT OFFERINGS

While service is of a primary importance to the chapter, social events are principally where lasting relationships among members are made and solidified. To ensure that all members have the opportunity to develop such relationships, the chapter should continually look for opportunities to diversify the social events offered each semester. Large-scale, traditional events maintain their charm and importance, but it is important to make sure that, as much as is possible, every member has the opportunity to find events that are meaningful. The chapter should further explore better means of accomplishing this, possibly through simplifying ways for members to host social events or by creating better avenues for publicizing unofficial socials.

#### 3. EVENTS FOSTERING ENGAGEMENT WITH MI-G ALUMNI

Alumni-student interaction is greatly beneficial for all parties, and accordingly for the chapter. As such, the chapter should work to increase the number of events which facilitate engagement of alumni. Such offerings could include events that are social or professional in nature. One area that shows particular promise is to schedule events when many alumni will already be in the area; such as Career Fair, Homecoming, or home athletic events, particularly football games.

## 4. CHAPTER REPUTATION AND IMAGE

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Of central importance to the mission of initiating more members is a positive public perception of Tau Beta Pi, particularly of the local Michigan Gamma chapter. To that end, it is critical that the chapter do what it can to solidify a worthwhile mission and image and to promote that image to the entire college community, with particular emphasis placed on potential new members.

### 1. CHAPTER MISSION AND DESIRED IMAGE

Being a chapter of the Tau Beta Pi Association, the central mission of the chapter is to recognize and foster distinguished scholarship and exemplary character among engineering students and alumni, and to foster a spirit of liberal culture within the engineering college. These are the central ideals of the chapter. To those we add service to the college, community, and profession. There are many ways that these ideals are borne out in the activities of the chapter, and those ways evolve over time. By continual reevaluation of the ways in which these ideals are lived out, the chapter ought to work to better and more effectively promote that image: an organization committed to academic excellence and exemplary character, continually striving to better the college as a whole, and the lives of the individual students therein.

### 2. IMPROVING REPUTATION AMONG POTENTIAL ELECTEES

Tau Beta Pi ought to work to maintain an unimpeachable reputation among all the members of the various communities in which it resides. Unfortunately, no honor society, by virtue of its construction, can make itself open and accessible to all. While the chapter ought to make every effort to be as inclusive as is possible within those confines, special consideration should be given to those students, who by their past and present accomplishments either find themselves eligible or show promise to soon attain eligibility. This is of particular importance for first and second year students.

Over the next five years, MI-G should seek to increase the means by which it can publicize itself to first and second year students, in particular to those students who show promise of being eligible as juniors or seniors. This could take the form of speaking to introductory engineering courses to publicize services like Book Swap or tutoring and to inform them of our existence and to encourage them to strive for excellence both within the classroom and without. Other options like the first year mixer attempted in winter 2014 or university functions like Engineering Welcome Day and Northfest should be duly considered as well.

### 3. DEVELOPING CONSISTENT TBP “BRAND”

In order to properly convey its existence and mission to as many people as possible, MI-G should seek to develop and maintain a consistent brand and appearance. Any publicity materials or public correspondences that the chapter uses should be developed to ensure that at best the mission of the chapter is advanced, and at worst it is not hindered. Here is considered such publicity items as flyers, social media, emails, apparel, public calendar postings, the website, and others. Any college facing events must also be considered. For these events, it is insufficient to maintain that “any publicity is good publicity,” rather in these events, the chapter ought to work to not only publicize its name but also to publicize and ideally advance its mission.

## 5. SIGNATURE EVENTS

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### 1. DEFINITION

A signature event is one which is integral enough to the life of the chapter that, by its addition or subtraction, would markedly change the image, culture, operations, structure, or financial health of the chapter. Such an event is unambiguously aligned to the core mission of the chapter and/or the Tau Beta Pi Association. A signature event must further be recognized as belonging to TBP MI-G beyond the current membership of the organization.

### 2. PRIORITIZATION, PLANNING, AND FREQUENCY

Signature events should be prioritized, and effort should be given to their continued improvement. In particular, the needs of each signature event should be given due consideration during the planning of each semester's meetings and events. While signature events are critical to the ongoing success of the chapter, they should be held to a reasonable number. Holding too many signature events can put undue strain on the chapter leadership's time and focus and can lead to a cheapened experience for attendees. Perhaps the greatest opportunity for improvement to the chapter's existing signature events is through greater publicity. Care and focus should be given to continually improving and expanding the publicity around chapter signature events.

### 3. CHAPTER VISION FOR SPECIFIC SIGNATURE EVENTS

#### 1. SWE/TBP Career Fair

While itself a separate organization and a joint venture with the Society of Women Engineers, Career Fair is of critical importance to the chapter. The vision of MI-G for the Career Fair is that it work to improve and expand in the following ways: that it continually work to increase the number and diversity of companies in attendance so that it may best serve the needs of the students at the college; that it investigate ways of increasing participation of both companies and students in fields typically underrepresented at the fair; that it seek to include participation by small companies founded by Michigan alumni; and that it continually innovate to improve the student experience.

#### 2. TBP Book Swap

One of MI-G's most visible events, TBP Book Swap is an important service to the college that provides a unique opportunity to improve the awareness and image of the chapter. The chapter should continually seek to increase the impact and relevance of TBP Book Swap. In addition to incremental improvements to the logistics and advertising of the event, it is of great importance that the event leadership continually consider "out of the box" improvements that could radically expand the scope of the event and improve the student experience of participation therein.

#### 3. K-12 Outreach (TBP MindSET, etc.)

There is perhaps no event more aligned to the MI-G's mission of promoting engineering as MindSET. Since its start at MI-G in 2010, MindSET has grown to become a program of central importance each semester. MI-G should work to continue to improve and expand the program, and related K-12 Outreach initiatives in the coming years. Particularly, effort should be made to increase outreach beyond the current target

audience of MindSET. Two areas of desired K-12 outreach expansion are in middle and high school outreach. The goals and structures of such outreach programs would be necessarily different: middle school outreach would focus more on core math and science to help prevent students turning away from STEM fields when choosing high school curricula, while high school outreach would focus more on engineering design—filling a largely vacant space and encouraging students already interested in math and science to explore engineering as a viable educational path. Both initiatives are integral to a fully-formed K-12 Outreach program and should eventually be included in chapter operations; however, due to limited personnel resources, and so as to focus on one attainable goal rather than splitting focus, the chapter should first focus on developing and stabilizing a program for high school outreach. In any expansion to the program, inclusion of schools and regions typically underserved or underrepresented in engineering should be prioritized to help maximize the “broader impact” of the program. Further, the chapter should work diligently to provide continually improving volunteer training, specifically for teaching science and math concepts to younger students.

#### 4. MLK Luncheons

The Martin Luther King, Jr. Luncheon series has long been a staple of the chapter’s efforts to foster a spirit of liberal culture, particularly with respect to social responsibility, within the engineering college. While the program has suffered for lack of stability recently, the events nevertheless offer a strong opportunity to meaningfully advance our mission while reaching new audiences. Given the recent instability, it is most important that the events continue to happen with regularity, namely at least three such luncheons should continue to be hosted each year. In years where enough meaningful topics can be staffed, expansion should be considered. Further, efforts should be made to work with similarly aligned organizations or departments to secure speakers, generate ideas, or increase publicity.

#### 4. EXPANSION TO FURTHER SIGNATURE EVENTS

The chapter hosts many events each semester that, with proper focus could be developed into signature events. One of the greatest needs for these events is in the areas of increased chapter publicity, improved chapter image, and greater contact with potential new members. Events that fall into these categories currently include “Tau Beta Pi Day”, “The Breakfast Parties”, and the “Underclassmen Mixer.” While none of these events currently merits consideration as a signature event, focus should be given to developing these and other similar events to help continually grow and improve the chapter.

## 6. TBP BEYOND U OF M

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While much of TBP MI-G's activities fall within the confines of the College of Engineering, it is important that MI-G maintain an active role outside of the college as well. In particular, ***THE CHAPTER OUGHT TO FOCUS ON INCREASING ITS ACTIVITY IN THREE KEY AREAS BEYOND THE COLLEGE: GREATER AWARENESS OF AND INTERACTION WITH THE NATIONAL ASSOCIATION, GREATER INTERACTION IN AND LEADERSHIP WITHIN DISTRICT 7, AND A GREATER INVOLVEMENT IN THE LOCAL ANN ARBOR COMMUNITY. OF THESE, THE FIRST TWO ARE OF GREATER IMPORTANCE, WHILE GREATER INTERACTION WITHIN THE COMMUNITY SHOULD FOLLOW AS THERE IS OPPORTUNITY.***

### 1. THE TAU BETA PI ASSOCIATION

Greater involvement at the national level necessitates greater awareness of the Association generally. This includes informing chapter members of opportunities such as fellowships and scholarships, but also of the existence of the Association generally. Within the Association, there are two programs which are seeking, in particular, to expand and improve the resources available to collegiate chapters. These are the District Program and the Student Advisory Board. It is important that MI-G lend its support to these groups and initiatives, both for the improvement of its own resources, but also for the betterment of other chapters. One important distinction afforded by the Association is that of TBP Laureate. Laureates are nominated by chapters and selected by a committee of District Directors. ***IN ORDER THAT TBP MI-G BETTER PARTICIPATE AT THE NATIONAL LEVEL, THERE SHOULD BE CREATED A COMMITTEE WITHIN THE CHAPTER TO CONSIDER AND NOMINATE MEMBERS FOR THE DISTINCTION OF LAUREATE.***

At present, MI-G enjoys very sound financial footing. The vast majority of the chapter's income, however, is from a single source: Career Fair. A financial priority of the chapter should thus be to investigate means of diversifying revenue streams particularly through endowing the operating budget insofar as is possible. At the same time, MI-G finds itself on sounder financial footing than most chapters, and perhaps even than the national organization. The push of late has been to create \$100,000 endowments for each chapter (referred to as CEI funds or CEI endowments) which would cover the expenses of the Convention voting delegate, chapter engineering futures, costs incurred to HQ by chapters, and district conferences. Any interest realized by the endowment beyond that necessary to cover the aforementioned expenses (approximately \$4,000) would be returned to the chapter in the form of project grants. In Fall 2015, the MI G officer corps voted unanimously to work with HQ to set up a chapter endowment for MI-G with an initial investment of \$100,000 which would fully defray the costs incurred by the chapter to HQ. Further, the vote stipulated that, as long as the chapter advisory board deems it to remain in the financial best interests of the chapter, the chapter should invest at least \$25,000 per year until the endowment is capable of fully supporting the chapter's operating budget. Over the next five years, and beyond, the chapter should work to make sure that the initial investment into the endowment is completed to the satisfaction of both HQ and MI-G and should continue to make these investments in the MI-G CEI endowment.

Michigan Gamma should continue and expand efforts necessary to host the National Convention in 2017, in commemoration of the bicentennial of the University. This includes creating the necessary committee/officer(s) to oversee preparation and logistics for the Convention.



## 2. DISTRICT 7

The annual District 7 Conference is the biggest event for the district each year. It alternates between Michigan and Ohio with a chapter in that state opting to host. Hosting the conference can be a big boost for a chapter and a way to prepare for hosting the annual Convention, but it can also be a drain on available resources. *As other chapters can likely gain more benefit from hosting the District Conference, MI-G shouldn't seek to host if other chapters are willing and able.* If no Michigan chapters are interested, however, *MI-G should be willing to host, as it can typically spare the bandwidth and has experience in running a successful conference.*

MI-G should perform more projects with other local collegiate chapters. Particular focus should be given to MI-I as they are fellow Wolverines and their chapter has struggled recently. Further, MI-G should host at least one inter-chapter social a year with more than two chapters present. To start, this could be a social for the officer corps of the chapters. Alumni Chapters could also be invited.

In addition to collegiate chapters, MI-G should work more with the Ann Arbor Area Alumni Chapter, particularly to help stabilize the chapter. There should be at least one joint event a semester, such as a homecoming tailgate, career advice seminar, or occasional mixers. Given the financial stability of the respective chapters it is recommended that MI-G be willing to shoulder much of the necessary funding for any such events, at least in the near future.

MI-G should explore hosting rivalry events such as tailgates before the MSU, OSU games and invite MI-G, MI-I, MI-A/OH-G members and alums. These type of events would allow the opportunity to network with alumni who may be back for the game and members of other chapters. This could even be expanded to encompass most or all of the home football games as TBP chapters exist at most schools that Michigan plays against.

## 3. TBP IN THE ANN ARBOR COMMUNITY

MI-G should continue to be involved in the community and look for opportunities to increase engineering-related volunteering. This should particularly focus on STEM outreach as discussed in Sections 3.1 and 5.3.3.

## 7. CHAPTER LEADERSHIP

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A central component of the chapter life cycle, effective leadership is of principal importance in charting a sound course for the organization. Michigan Gamma already enjoys a variety of leadership positions and strong continuity offered through its advisory board. Continuing to improve the leadership resources available is vital to the long-term growth and success of the organization.

### 1. TRANSITIONS

As a student organization, MI-G experiences high semester-to-semester turnover of officers. While the advisors can help to ensure smooth transitions of most of the high-level ideas and functions of the chapter, the scope of chapter operations necessitates that more work be done to ensure that as much knowledge as possible is carried over each semester. While transition material specific to each officer position is usually adequate, and while transition material for the officer corps as a whole has improved of late, such transition material should continue be expanded in a way that is easy to update and readily accessible to new officers. Areas of specific need include overview of officer responsibilities that may impact other officers (announcement submission, social media, flyers, newsletters, New Initiatives topics, etc.) and responsibilities of the officers collectively. Effort should be further made to ensure that transition material is kept up-to-date throughout the semester and that transition material be preserved in a sustainable and recoverable manner.

### 2. LEADERSHIP DEVELOPMENT AND TRAINING

For many new officers, a first time leadership position in an organization as large and complex as MI-G can be overwhelming. To that end it is recommended that the chapter seek new and varied ways of providing ample leadership development and team-building opportunities for officers, chairs, and other chapter leaders. These can include such avenues as Engineering Futures modules or various leadership skills assessments.

### 3. ADVISOR RESPONSIBILITIES

One of the strengths of chapter advisors is their ability to take on previously undefined roles to help the organization. Sometimes these are one time roles that need no continuity or transitioning, at other times these are new, lasting responsibilities that need to be formalized and carried forward. Even advisors will eventually leave the organization. In the coming years TBP should work to formalize processes by which these responsibilities become formalized into chair or officer positions so that they may be easily transitioned when necessary. Additionally, there are a number of responsibilities that ought to remain within the advisory board but should be formalized such that they are always accounted for. The advisory board should make a priority of identifying such responsibilities and a means of formalizing them.

### 4. BUDGET WORKFLOW IMPROVEMENTS

Finances are critical to the ability of MI-G to perform many of its signature or otherwise noteworthy events throughout the year. Ensuring that budget workflows are established to ensure the long-term financial wellbeing of the organization is imperative. As such periodic review by the advisory board is recommended to continue; however, the advisory board should investigate means to better balance such

oversight with efficiency. In particular, it may be beneficial to preemptively review and approve only those budget items which the treasurer or an individual officer wishes to appreciably modify from previous semesters. Better documentation of all aspects of budget and finance is further recommended, particularly with respect to the chapter's centennial endowment.

## 8. CHAPTER OPERATIONS

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### 1. CHAPTER WEBSITE PRESENCE

The chapter website serves two main purposes: 1) informing people external to the organization about TBP MI-G and 2) providing functionality for assisting chapter operations. Both of these are critical tasks that should be continued and prioritized going forward. While some user unfriendliness may be borne for the second task, the first requires considerable effort to ensure that people outside of the organization are able to find the information they need, with particular regard to those who may be interested in and able to join.

#### 1. Website Sustainability

Perhaps the most crucial failure of the former MI-G website was its inability to be easily maintained and expanded once the developer left. It is imperative therefore, that proper procedures be put in place to allow smooth transition of the website semester-to-semester. Specific goals to this end include:

1. Consolidating the web presence as much as possible. While the Career Fair will likely continue to maintain a website wholly separate from the chapter, other activities of the chapter should be run from the website insofar as is possible. This includes, specifically, the TBP Book Swap website front-end. There do exist instances where consolidation would not be beneficial. The Book Swap back-end is currently one such instance. For ease of maintenance, it is likely preferable to maintain this separately.
2. Full documentation of the website code base and functionality. Ensuring that the code is accessible to someone apart from its original author will help ensure that the website will continue to be an asset to the chapter for years to come.

#### 2. Website Functionality

The website has already proven to be a large asset in data tracking for the chapter. Expanding the functionality of the website to handle more chapter tasks will help free up personnel resources to improve the offerings of the chapter. An important component to this is that the chapter be willing to spend what is necessary in upkeep for whatever platform is running the website.

### 2. CHAPTER INTERACTIONS WITH THE COLLEGE OF ENGINEERING

While much has been covered regarding the chapter's interaction with the broader communities in which it resides, arguably its most important community is that within the college. In addition to activities within that community being the most visible to potential new members, it is also the area where chapter activities can be the most impactful. To accomplish this, it is important that the chapter stay abreast of the goings on within the college. One important method of achieving this is to maintain regular contact with the College administration such as the various Deans and the Office of Student Affairs.