



Goal-Setting Guidebook



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OVERVIEW: The Goal-setting Process

Step 1. Complete the Chapter Assessment in Section 1 with Executive Committee members.

- Review your chapter's recent history of Programming, Membership, Chapter Operations, and Leadership.
- Determine which efforts have been successful and which could be improved.
- Consider general areas for growth by examining the top challenges.
- Begin turning the areas for growth into goals.

Step 2. Use the Individualized Growth Plan Worksheet in Section 2 to generate and clarify areas in which chapter leaders should focus their goals.

Step 3. Use the Goal-Setting Worksheets in Section 3 to:

- formulate general goals based on the chapter's successes, challenges, and improvements;
- consider the barriers to achieving the goals and expected results; and
- develop an action plan for each goal, identifying steps, participants, and timelines for successfully completing the goal.

Tips for Success

Because goals tend to be very broad, it is often difficult to know where to begin. Some things to consider about setting goals include:

- Goals should be attainable.
- Goals should be observable.
- Goals should be measurable.
- Goals should be time bound, not open-ended.

Goals should be set with the entire committee. Make blank copies of the Goal-Setting Worksheets to create action plans for each goal leaders choose to target.

Section 1: CHAPTER ASSESSMENT

Chapter Programming and Activities

Y / N

Does your chapter host activities that support the KDP mission? _____

Did your chapter organize any service projects last semester/year? _____

Did your chapter partake in any Society-sponsored service projects, such as Reading Is Fun or Celebration of Teaching? _____

Did your chapter conduct any professional development programs? _____

Did your chapter organize any social or networking events? _____

Did your chapter organize any fund-raisers? _____

Did your chapter have an awards and recognition program or prepare communications to recognize members and/or excellence in education? _____

Did your chapter promote the scholarship opportunities available to members, including undergraduate, graduate, and doctoral scholarships and the National Student Teacher of the Year Award? _____

Based on your responses to the above questions and other knowledge you may have, what are the top three challenges your chapter is facing in the area of programming?

1. _____
2. _____
3. _____

Chapter Membership

Y / N

Has your chapter conducted recruitment activities to encourage qualified individuals to become members of Kappa Delta Pi? _____

Does your chapter have an informational Orientation Meeting to educate potential members about KDP's services and benefits? _____

Do you know the percentage (approx.) of individuals who join locally? _____

Did your chapter conduct an initiation last year? _____

Did the number of initiates increase last year over the previous year? _____

Is at least one initiation planned for this year? _____

In addition to the candle-lighting ritual, does your chapter enhance the initiation ceremony with speakers, a reception, music, etc.? _____

Does your chapter have a post-initiation commitment program for retaining new members? _____

Did your chapter conduct an interest survey to determine member needs? _____

Did your chapter plan any activities to promote active involvement among on-campus members initiated in previous years? _____

Does your chapter encourage members to renew their membership by paying dues to Headquarters? _____

Does your chapter keep in touch with alumni members? _____

Based on your responses to the above questions and other knowledge you may have, what are the top three challenges your chapter is facing in the area of membership?

1. _____

2. _____

3. _____

Basic Chapter Operations

Y / N

Are member meetings held regularly (at least three times per year)? _____

Do meetings have programs of interest to members? _____

Do at least 50 percent of members attend meetings and activities? _____

Do the Executive Committee and other committees meet regularly? _____

Does the chapter have an established budget? _____

Does the chapter have a method of regular communication outside of meetings (newsletter, e-mail, bulletin board, Web page, Listserv)? _____

Are initiation lists, new initiate information forms, and dues submitted to Headquarters within two weeks after the initiation ceremony? _____

Did your chapter submit its Annual Report by August 1? _____

Do you know who your Chapter Resource Consultant is? _____

Are you aware of the resources available from your Chapter Resource Consultant (e.g., active member lists, programming ideas, officer training)? _____

Will chapter members attend Society-sponsored conferences this biennium?
If so, how many? _____

Based on your responses to the above questions and other knowledge you may have, what are the top three challenges your chapter is facing in the area of chapter operations?

1. _____

2. _____

3. _____

Chapter Leadership

Are all chapter officer, counselor, and committee chair positions filled?

_____ Counselor

_____ Secretary

_____ Associate Counselor

_____ Foundation Representative

_____ President

_____ Historian

_____ Vice President

_____ Membership Committee Chair

_____ Treasurer

_____ Programming Committee Chair
(if other than the Vice President)

Did your chapter officers receive formal training from either the counselor or past chapter officers? _____

Do committees meet between chapter meetings to complete work and plan activities? _____

Do members other than executive officers participate on committees? _____

Based on your responses to the above questions and other knowledge you may have, what are the top three challenges your chapter is facing in the area of leadership?

1. _____
2. _____
3. _____

CHAPTER ASSESSMENT COMPLETE

Section 2: INDIVIDUALIZED GROWTH PLAN

Name _____ Counselor _____ Date _____
 University _____ Chapter # _____

Basic Guidelines

INITIATION
 Hold at least one initiation per academic year and submit paperwork two weeks after the ceremony.

ANNUAL REPORT
 Complete the chapter Annual Report (IRS document) and submit it to Headquarters by August 1 of each year.

CHAPTER PROGRAM
 Hold at least one general membership meeting or program each academic year.

CONFERENCES
 Attend at least one Society conference each biennium.

Growth Opportunities:

- Basic recruitment
- Additional recruitment methods
- Ceremony enhancements
- Orientation meeting
- Ongoing membership education
- Initiate 10 percent of school of education
- Two initiations each year
- Initiate local educators
- Invite alumni

Growth Opportunities:

- Fund-raiser
- Offer local scholarships and recognition
- Donate to the Kappa Delta Pi Educational Foundation
- Update chapter bylaws
- Communicate with Chapter Resource Consultant at least four times a year to relay news and request resources
- Update chapter archives
- Elect officers and co-officers by April
- Officer training and transition
- Committees
 - Programming
 - Membership
 - Other(s)
- Chapter marketing & communication
 - Bulletin board
 - Newsletter
 - E-mail
 - Web site
 - Other(s)

Growth Opportunities:

- Service project
- Professional development
- Social activity
- Retention program
- Use member interest survey
- Network with another organization
- Hold membership meetings at least four times a year
- RIF Grant
- COT Grant

Growth Opportunities:

- Leadership Forum
- Regional I TEACH Conference
- Cluster Meeting
- Counselor Academy
- Biennial Convocation
- Non-KDP conference
- Sending delegation to Convocation (3+ members)
- Host a professional development conference
- Host a KDP conference with Society Headquarters

Section 3: GOAL-SETTING WORKSHEETS

General Chapter Goals

- A. What did the chapter do well last year? Identify the activities the chapter should repeat.
- B. Take another look at the “Chapter Assessment” you completed. **List five general areas** upon which the chapter should improve (for example, recruiting new members, professional development programming, or member involvement.)

1. _____
2. _____
3. _____
4. _____
5. _____

- C. Turn each of the five areas into a specific, **measurable outcome statement or attainable goal** (for example, increase the number of new initiates from last year or involve every member in at least one chapter activity or committee).

GOALS:

1. _____
2. _____
3. _____
4. _____
5. _____

Obstacles and Results

Copies of this form should be made for each specific goal identified on the Goal-Setting Worksheet.

GOAL: _____

Step 1. Brainstorm Potential Obstacles

Identify **possible barriers** that might hinder the achievement of the above goal.

-
-
-
-

Step 2. Use Assessment to Eliminate Obstacles

A. Carefully consider each of the restraints brainstormed in Step 1 and compare them with the ultimate goal. **List the resources** that can be called upon to achieve the desired outcome and overcome the obstacles. (Resources might include the time, talent, and expertise of chapter members and people outside your chapter, financial help, or people-power resources.)

B. How will you know when progress is made? **List specific, measurable results** that indicate the chapter is progressing toward the desired goal.

1. _____
2. _____
3. _____
4. _____
5. _____

Action Plan

GOAL: _____

List the specific actions your chapter will take to achieve the goal. Be sure to consider obstacles, resources, and measurable progress. Specify a leader and completion date for each action.

GOAL:			
STEP:	ACTION:	PERSON RESPONSIBLE:	TARGET DEADLINE:
1.			
2.			
3.			
4.			
5.			

Good luck setting goals for your chapter!
For more ideas and resources, contact your
Chapter Resource Consultant at KDP Headquarters.

(800) 284-3167