



CHAPTER STRATEGIC PLAN

UPDATED:



CHAPTER STRATEGIC PLAN OVERVIEW

The chapter's Strategic Plan is an essential tool for driving the chapter toward excellence. The strategic plan defines the chapter's strategy and helps the chapter make decisions on how to best allocate resources and manpower to pursue this strategy.

The following terms provide context for the chapter's approach to strategic planning and goal setting. Subsequent pages of this document include the chapter's compiled responses and strategic plan. Resources and links to LEAD sessions and chapter workshops have also been included in this document. These resources provide guidance for the creation and maintenance of the chapter's strategic plan and goals.

THE CHAPTER'S MISSION, VISION, AND PURPOSE

Vision – An action statement created by the chapter's leadership that propels the chapter toward its mission and describes the way the chapter will pursue its mission.

Mission – A statement of core ideology that describes the purpose of the chapter. The chapter officers and members determine the mission informed by the Fraternity's *Ritual*, history, The Law, as well as the chapter's local history and bylaws.

Envisioned Future – Statements that represent what the chapter envisions its future will be in 1-5 years.

SWOT Analysis – SWOT is an acronym for Strengths, Weaknesses, Opportunities, and Threats. The purpose of the SWOT analysis is to isolate key issues impacting the chapter and opportunities for focus.

- **Strengths** – are the best performance areas of the chapter.
- **Weaknesses** – are the performance areas that are hindering the chapter's success.
- **Opportunities** – are specific things that the chapter could turn into advantages or positives.
- **Threats** – are specific things that could impede the chapter's success in an area.

Goals should be **S.M.A.R.T.**

- Specific:** clearly defined, understood, and focused on the details of what is to be accomplished or achieved (e.g. increase chapter membership).
- Measurable:** describes a specific state by which success can be gauged (e.g. increase chapter membership by 10%).
- Agreed upon:** the goal has been agreed upon by the individuals or group that is responsible for achieving it and that it is designed to benefit (e.g. officer, committee, chapter – these groups agree that 10% growth is desired, as opposed to 5 or 15%, for example).
- Realistic:** the goal is a state that the internal resources of the chapter are capable of achieving; taking into account external factors. Resources might include: members, money, events/dates on calendar. External factors might include: other students, the community at-large, state and federal laws, parents. (e.g. if half the membership is set to graduate and/or enrollment is decreasing and most men on campus are already in a fraternity, increasing membership by 10% may be unrealistic).
- Time Sensitive:** has a completion deadline (e.g. increase chapter membership by 10% by May 1).

The following resources assist the chapter's officers and committees in setting their own goals if the chapter has not yet conducted a goal setting session for the term or additional assistance is needed.

[Goal Setting LEAD Session](#) [New Executive Committee Goal Setting](#)

SAMPLE GOAL

Goal 1: Conduct chapter recruitment training session.

Due Date: 12/15/2019

Action Items: Recruitment Chairman should review available resources on the General Fraternity website and schedule a call with the Chapter's Leadership Consultant to determine best practices for a chapter-level recruitment meeting. Chairman should also connect with the Executive Committee to set a date on the chapter's calendar for the training and coordinate an announcement during an upcoming chapter meeting.



CURRENT CHAPTER OFFICERS

OFFICER POSITION	NAME
COMMANDER	
LIEUTENANT COMMANDER	
TREASURER	
RECORDER	
MARSHAL	
CHAPLAIN	
LEAD CHAIRMAN	
RECRUITMENT CHAIRMAN	
ALUMNI RELATIONS CHAIRMAN	
RISK REDUCTION CHAIRMAN	
SCHOLARSHIP CHAIRMAN	
SOCIAL CHAIRMAN	
SERVICE AND PHILANTHROPY CHAIRMAN	
HOUSE MANAGER	

CURRENT CHAPTER ADVISORS

ADVISOR	NAME
CHAPTER ADVISOR	
ALUMNI ADVISORY BOARD CHAIRMAN	
DIVISION COMMANDER	
FACULTY ADVISOR	

THE STRATEGIC PLAN

The [Strategic Planning LEAD Session](#) from Module B of All Chapter LEAD is used to assist the chapter in the development and maintenance of the chapter's Vision, Mission, and SWOT Analysis. The chapter's current Mission, Vision, and SWOT Analysis are displayed on page 4.

The [PEP Strategy Session](#) from Module B of All Chapter LEAD informs the chapter's current work and goals in each of the 10 subcategories of the Pursuit of Excellence Program. The chapter's envisioned future for each subcategory and the chapter's goals are outlined on pages 5-14.



CHAPTER VISION:

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CHAPTER MISSION:

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SWOT ANALYSIS:

<u>STRENGTHS</u>	<u>WEAKNESSES</u>
<u>OPPORTUNITIES</u>	<u>THREATS</u>



SERVICE AND PHILANTHROPY

The Fraternity defines Service and Philanthropy as: *Future leaders are transformative throughout the communities they interface with. Service to others, through the donation of time, talent, and treasure, is a core mechanism for creating leaders as engaged citizens in their local community.*

[Pursuit of Excellence Evaluation Guidelines for Service and Philanthropy](#)

OFFICER(S) RESPONSIBLE:

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ENVISIONED FUTURE:

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Goal 1:

Due Date:

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Goal 2:

Due Date:

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Goal 3:

Due Date:

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Goal 4:

Due Date:

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Goal 5:

Due Date:

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CAMPUS LEADERSHIP

The Fraternity defines Campus Leadership as: *Members of the Fraternity enhance their host institution by becoming engaged as leaders in campus and interfraternal activities and organizations. Through their leadership, members advance the purpose of both the fraternity and their institution. This is recognized as a contribution to the greater good.*

[Pursuit of Excellence Evaluation Guidelines for Campus Leadership](#)

OFFICER(S) RESPONSIBLE:

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ENVISIONED FUTURE:

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Goal 1:

Due Date:

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Goal 2:

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Goal 3:

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Goal 4:

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Goal 5:

Due Date:

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VALUES CONGRUENT ENVIRONMENTS

The Fraternity defines Values Congruent Environments as: *The physical and social environments created by the Fraternity foster growth and development and the establishment of lifelong friendships. This includes the promotion of a safe and healthy lifestyle. The chapter will foster a brotherhood that respects the dignity of people while embracing the free exchange of ideas.*

[Pursuit of Excellence Evaluation Guidelines for Values Congruent Environments](#)

OFFICER(S) RESPONSIBLE:

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ENVISIONED FUTURE:

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Goal 1:

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Goal 5:

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INTELLECTUAL DEVELOPMENT

The Fraternity defines Intellectual Development as: *Chapter will positively impact intellectual development by promoting the importance of academics and by supporting its members through activities which develop the intellect and support critical thinking.*

[Pursuit of Excellence Evaluation Guidelines for Intellectual Development](#)

OFFICER(S) RESPONSIBLE:

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ENVISIONED FUTURE:

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CANDIDATE DEVELOPMENT

The Fraternity defines Candidate Development as: *Through a variety of learning and mentoring experiences, candidates are prepared to be active members of the Fraternity with a commitment to the values and purpose of Sigma Nu.*

[Pursuit of Excellence Evaluation Guidelines for Candidate Development](#)

OFFICER(S) RESPONSIBLE:

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ENVISIONED FUTURE:

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Goal 4:

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Goal 5:

Due Date:

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BROTHER DEVELOPMENT

The Fraternity defines Brother Development as: *The chapter prepares brothers to be effective in leadership roles within Sigma Nu and other organizations and experiences. In addition, active members are prepared to be successful alumni.*

[Pursuit of Excellence Evaluation Guidelines for Brother Development](#)

OFFICER(S) RESPONSIBLE:

ENVISIONED FUTURE:

Goal 1:

Due Date:

Goal 2:

Due Date:

Goal 3:

Due Date:

Goal 4:

Due Date:

Goal 5:

Due Date:



ALUMNI DEVELOPMENT

The Fraternity defines Alumni Development as: *Sigma Nu shall identify and engage alumni and volunteers to support the success of the chapter, develop and perpetuate fraternal leadership and increase the value of lifelong membership.*

[Pursuit of Excellence Evaluation Guidelines for Alumni Development](#)

OFFICER(S) RESPONSIBLE:

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ENVISIONED FUTURE:

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RECRUITMENT AND MANPOWER

The Fraternity defines Recruitment and Manpower as: *The manpower of a chapter must be sufficient to maintain all successful chapter operations in a manner which provides a positive fraternal experience. Further, Sigma Nu will strive for growth through an innovative, values-based recruitment program that engages new members who are committed to the founding principles of the Fraternity.*

[Pursuit of Excellence Evaluation Guidelines for Recruitment and Manpower](#)

OFFICER(S) RESPONSIBLE:

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ENVISIONED FUTURE:

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Due Date:

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Goal 4:

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Goal 5:

Due Date:

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CHAPTER OPERATIONS

The Fraternity defines Chapter Operations as: *Sigma Nu will ensure the necessary structures, systems, and resources are in place in support of the Fraternity. This includes fiduciary responsibility, organized administration, and effective planning to best achieve the aims of Sigma Nu.*

[Pursuit of Excellence Evaluation Guidelines for Chapter Operations](#)

OFFICER(S) RESPONSIBLE:

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ENVISIONED FUTURE:

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Goal 1:

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Goal 5:

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GOVERNANCE AND ACCOUNTABILITY

The Fraternity defines Governance and Accountability as: *Effective governance structures and measures of accountability must be in place within the Fraternity. These measures should complement the values of the Fraternity while maintaining integrity to the purpose of the organization.*

[Pursuit of Excellence Evaluation Guidelines for Governance and Accountability](#)

OFFICER(S) RESPONSIBLE:

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ENVISIONED FUTURE:

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Goal 1:

Due Date:

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