

Strategic Planning and Action Plans Overview

Strategic planning is a disciplined effort to produce decisions and actions that shape and guide what an organization is, what it does and why it exists. To deliver the best results, strategic planning requires information gathering, development and exploration of strategic alternatives, and an emphasis on the future implications of present decisions.

Strategic planning at the chapter level is a necessary exercise for any chapter that pursues Excellence and aims to become a Rock Chapter. The practice provides chapters with an opportunity to establish a shared mission, vision, and purpose that will drive behavior and chart a course for the chapter's desired destination. Action Plans are a part of the strategic planning process and exist to both supplement the chapter's strategic plan and flesh out the philosophy, activities, and effort that will be needed for the chapter to accomplish its goals in each of its areas of operation.

The General Fraternity supports the efforts of its chapters to think and plan strategically by offering strategic planning and action plan templates that will facilitate this process. These templates include a general template for the chapter's strategic plan and one template for each of the ten subcategories of chapter operations defined within the [Pursuit of Excellence Program](#).

Chapter Strategic Planning Template

Service and Philanthropy Action Plan	Brother Development Action Plan
Campus Leadership Action Plan	Alumni Development Action Plan
Values Congruent Environments Action Plan	Recruitment and Manpower Action Plan
Intellectual Development Action Plan	Chapter Operations Action Plan
Candidate Development Action Plan	Governance and Accountability Action Plan

The following resources and information will assist the chapter in the development of its strategic and action plans.

Key Terms and Components of a Strategic Plan

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 the chapter could turn into advantages or positives.
- **Threats** – are specific things that could impede the chapter's success in an area.

Goal Setting

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

- Specific:** clearly defined 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:** created through chapter consensus, meaning that the chapter-at-large is committed to the goal, chapter accountability, and working collectively to accomplish the goal.
- Realistic:** takes external factors into account (e.g., if 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: 12/15/20XX
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.	

Additional Resources

The [Officer Resource pages](#) are dedicated pages for each of the General Fraternity's officially recognized officer positions. Each page includes a wealth of resources including an officer manual for each position, copies of the [Law of Sigma Nu Fraternity, Inc.](#), the [Risk Reduction Policy](#), and officer resources designed to address the specific expectations of each office.

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 of the [Chapter Strategic Planning Template](#).

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 of [Chapter Strategic Planning Template](#).

The [Delegation Session](#) from Module B of All Chapter LEAD focuses on delegation and how to be an effective committee member and manager. By using the steps in this workshop, members will be prepared for success and in the process, will begin developing others in the chapter.

The [New Officer Goal Setting Guide](#) helps new offices hit the ground running and aids them in establishing their goals and acquiring the necessary resources to be successful during their term.