

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 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 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.	

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	
Fraternity/Sorority 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

Chapter Mission

SWOT Analysis

<p>Strengths</p>	<p>Weaknesses</p>
<p>Opportunities</p>	<p>Threats</p>

Service and Philanthropy

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:

ENVISIONED FUTURE

Goal 1:

Due Date:

Goal 2:

Due Date:

Goal 3:

Due Date:

Goal 4:

Due Date:

Goal 5:

Due Date:

Campus Leadership

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:

ENVISIONED FUTURE

Goal 1:

Due Date:

Goal 2:

Due Date:

Goal 3:

Due Date:

Goal 4:

Due Date:

Goal 5:

Due Date:

Principles Congruent Environments

The physical and social environments created by the Fraternity foster positive 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 Principles Congruent Environments

OFFICER(S) RESPONSIBLE:

ENVISIONED FUTURE

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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Intellectual Development

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:

ENVISIONED FUTURE

Goal 1:

Due Date:

Goal 2:

Due Date:

Goal 3:

Due Date:

Goal 4:

Due Date:

Goal 5:

Due Date:

Candidate Development

Through a variety of learning and mentoring experiences, candidates are prepared to be initiated members of the Fraternity with a commitment to the principles and purpose of Sigma Nu.

Pursuit of Excellence Evaluation Guidelines for Candidate 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:

Brother Development

The chapter prepares brothers to be effective in leadership roles within Sigma Nu and other organizations and experiences. In addition, initiated 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

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:

ENVISIONED FUTURE

Goal 1:

Due Date:

Goal 2:

Due Date:

Goal 3:

Due Date:

Goal 4:

Due Date:

Goal 5:

Due Date:

Recruitment and Manpower

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, principles-based growth 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:

ENVISIONED FUTURE

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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Chapter Operations

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:

ENVISIONED FUTURE

Goal 1:

Due Date:

Goal 2:

Due Date:

Goal 3:

Due Date:

Goal 4:

Due Date:

Goal 5:

Due Date:

Governance and Accountability

Effective governance structures and measures of accountability must be in place within the Fraternity. These measures should complement the principles of the Fraternity while maintaining integrity to the purpose of the organization.

Pursuit of Excellence Evaluation Guidelines for Governance and Accountability

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: