

Chapter Operations Action Plan

**This Action Plan was Updated:
By:**

The Chapter Operations Action Plan

The Chapter Operations Action Plan is an essential tool for outlining the chapter's strategy for success in chapter operations, which includes finances, budgeting, membership reporting, and maintaining reverence for *The Ritual*. The Fraternity believes that its chapters should 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.

The foundation of this plan is grounded in the idea that Sigma Nu chapters should be able to effectively plan and develop the system necessary to achieve their goals. This plan is designed to help the chapter think strategically about the operational necessities of promoting sound fiduciary responsibility, administrative practices, and proficiency in performance of the Fraternity's ritual ceremonies.

Resources and Support

This Chapter Operations Plan was completed under the guidance of the following chapter resources:

- [Treasurer's Officer Manual](#)
- [Chaplain's Officer Manual](#)
- [Pursuit of Excellence Guidelines for Chapter Operations](#)
- [Strategic Planning and Officer Action Plan Overview](#)
- [Federal Tax and Form 990 Filing Guide](#)
- [Important Due Dates](#)
- [The Law of Sigma Nu Fraternity, Inc.](#)
- [Risk Reduction Policy](#)

Envisioned Future

Chapter Finances

SETTING THE BUDGET

Chapter's tactics and strategies for creating its budget.

STAYING ORGANIZED

Chapter's methods for maintaining financial records.

PROTECTION AND PREVENTION

Chapter's methods for protecting itself against financial harm such as theft, fraud, sunk costs, and lost revenue.

TAX-EXEMPTION AND FORM 990

Chapter's most recent IRS Form 990 Tax Filing.

The chapter last filed a _____ on _____

The Finance Committee

THE TREASURER

The role and expectations of the Treasurer.

THE FINANCE COMMITTEE ROSTER

Committee Member Name	Position
	Treasurer

Advisor Name	Advisor Position	Phone	Email
	Committee Advisor		

FINANCE COMMITTEE ROLE

The role and expectations of the Finance Committee.

FINANCE COMMITTEE GOALS

Committee goals use the S.M.A.R.T. format – Specific, Measurable, Agreed-Upon, Realistic, and Timely.

FINANCE COMMITTEE MEETING SCHEDULE

FINANCE COMMITTEE EXPECTATIONS

FINANCE COMMITTEE STANDARD AGENDA

The standard agenda for future Finance Committee meetings will be as follows:

FINANCE COMMITTEE BUDGET

Membership Roster and Reporting

MEMBERSHIP ROSTER AND REPORTING

Chapter's process and schedule for reviewing and updating its roster with the General Fraternity (resource: [Members Area Instructions](#)).

The Ritual

EDUCATING MEMBERS ON *THE RITUAL*

RITUAL INVENTORY

Current condition of the chapter's Ritual materials.

RITUAL ROBES

CONDITION

Commander

Lt. Commander

Marshal

Chaplain

Sentinel

Honor Candidate

RITUAL ITEMS

CONDITION / QUANTITY

STYLE

Sword

Bible

Candles

Ribbon

Alpha Chest

RITUAL BOOKS

CARE FOR RITUAL MATERIALS

Description of the chapter's plan for taking care of its Ritual items.