Chi Phi Fraternity
Strategic Planning Guide

PURPOSE

Strategic Planning is an important practice of successful organizations and Chapters. It helps leaders and members align their values, purpose, initiatives, and plans for what they want to achieve. This guide is to help guide through the process of creating a Strategic Plan that can then be implemented by a Chapter.

THE STRUCTURE

This guide is broken into 5 key sections:

1. Values/Purpose of the Chapter
2. Environmental Scan
3. Identifying Key Focus Areas
4. Planning
5. Implementation

The end product will be a complete Strategic Plan for the Chapter with specific goals and an action plan charted out.

This process should be done by at least the Executive Council of the Chapter but can also include general members as well. Other key resources to consider involving are your Chapter Advisor(s), National Staff Contact, Fraternity/Sorority Life Advisor, and alumni.

Please share your completed Strategic Plan with your National Staff Contact for support.

VALUES OF THE CHAPTER

Review the Chi Phi Creed. What values can be identified in the Chi Phi Creed?

_____   _____   _____

_____   _____   _____

Chi Phi's Mission Statement

To build better men through lifelong friendships, leadership opportunities, and character development.

Chi Phi's Founding Core Values

Truth, Honor, and Personal Integrity

Chi Phi's Modern Core Values

Friendship, Respect, Honesty, Responsibility, Commitment, Personal Development

Review your Chapter's Motto, Mission, and Vision.

OUR CHAPTER VALUES

Review the following list of values individually selecting 5 values you believe are the top values of the Chapter. Once everyone has selected their 5 values of the chapter, work as a large group to identify the top 3 values of the chapter.

Academics	Compassion	Freedom	Leadership
Accomplishment	Dedication	Friendship	Love
Accountability	Dependability	Generosity	Loyalty
Achievement	Diversity	Growth	Recognition
Balance	Equality	Honestly	Respect
Brotherhood	Fairness	Humility	Responsibility
Caring	Faith	Integrity	Service
Community	Family	Justice	_____

Top 3 Values of Our Chapter: _____   _____   _____

Value #1 _____

Why is this a top value of the Chapter?

How is this value shown frequently in the Chapter?

What would the Chapter be missing if it did not have this as a top value?

Value #2 _____

Why is this a top value of the Chapter?

How is this value shown frequently in the Chapter?

What would the Chapter be missing if it did not have this as a top value?

Value #3 _____

Why is this a top value of the Chapter?

How is this value shown frequently in the Chapter?

What would the Chapter be missing if it did not have this as a top value?

CHAPTER ENVIRONMENTAL SCAN

As a group, take a holistic look at the Chapter is an important step in Strategic Planning. One tool to use for that is to perform a SWOTT Analysis.

- Be honest about the Chapter
- Be as specific as possible
- Be concise

Using the Chapter's past Accreditation could be helpful in this process.

Strengths- What are the things that the chapter does well? Use your own lens and also that of others and how they see your Chapter.	
Weaknesses- What are the things that the chapter does not do well? Use your own lens and also that of others and how they see your Chapter.	
Opportunities- What are the opportunities that exist for the chapter looking at what is listed for the strengths and weaknesses?	
Threats- What are the things that threaten the chapter and work against your Opportunities?	
Trends- What are the trends you see in the above information?	

THE 4 PHASES OF A CHAPTER

Review the 4 Phases of a Chapter resource from the North-American Interfraternity Conference. Individually go through and mark where in each row you think your Chapter currently falls in that area. Once everyone has done that, discuss it together to compare what each other thought and complete the following reflection questions.

What phase do you believe your Chapter is currently in and why?

What do you believe is the most positive perspective your Chapter has? Why?

What do you believe is the most negative perspective your Chapter has? Why?

As an Officer or member, what is your role in improving the phase your chapter is currently in?

4 Phases of a Chapter

Perspective	Early Years	Glory Years	Slippery Slope	Lord of the Flies
Avg. Member Mindset	Ideal fraternity experience	Being a model chapter; setting the standard for campus & chapter	Work hard; play hard; we are not nearly as bad as…	Wolf of Wall Street; stay out of trouble
Type of Student Joining	Great Guys—68% Good Guys—30% Belforts—2%	Great Guys—50% Good Guys—45% Belforts—5%	Great Guys—40% Good Guys—50% Belforts—10%	Great Guys—10% Good Guys—65% Belforts—25%
A vs. B Team	A leading; A & B trusted each other	A in charge; B begins thinking A is shady; self-governance got more difficult	A and B in a silent war; self-governance was very difficult	B mostly in charge (formally and informally); A marginalized; self governance nearly impossible
Membership Selection Criteria	Is he a man of character?	Is he a man of character and cool?	Is he cool and driven?	Is he fun to party with? Will women like him? Is he manly enough?
Chapter's Confidence Level	Humble	Confident	Over confident	Arrogant; untouchable
Chapter's Motivational Level	Hungry	Focused	Settling for average in non-social areas	Entitled; drop if no social
Transparency	Nothing to hide	Willing to talk about problems	We can't talk about that with them in the room	Don't get caught; the cover-up bonded them together
Leadership Make-Up	Strong group of visionary leaders	Top upperclassman held key positions	Many of the top upperclassman pursued on-campus leadership positions or didn't run for key chapter positions	Young brothers were thrown into a very difficult situation
Leadership Development Programs	Eager to learn and help other chapters	A chance to develop leaders & support other chapters; started to see programs as requirements	Saw them as requirements; lower involvement; felt like prisoners	Waste of time/money; only for dorky, struggling chapters
New Member Program	Proud didn't haze; program needed more structure	Proud didn't haze; very structured program	Need to make them earn it more; 1-off hazing incidents; program became less consistent	Written program for outsiders; private program for brothers & new members
Relationship w/National Org, House Corp, and Advisors	Seen as mentors & friends	Seen as helpful; but let us do it on our own	Big brother; engaged when they needed something	Us vs. them; both sides resented each other

0 1 2 3 4 5 6 7 8 9 10

KEY FOCUS AREAS

Discuss as a group what you believe should be the Key Focus Areas that you want to identify and address. Look back at the Chapter SWOTT Analysis and what phase your chapter is in. These are the 3 areas that you are going to create a specific plan for.

As a group, come up with 3 Key Focus Areas and write them below.

Focus Area #1-

Why is this important?

Focus Area #2-

Why is this important?

Focus Area #3-

Why is this important?

You will now work through a SWOTT Analysis of each Key Focus Area identified on the following pages of the guide. This portion can be done as a large group or with everyone broken into 3 different groups to work on these. If you do this in 3 groups, come together as a large group to review what each come up with and see if there are additional thoughts or ideas from others that should be included.

FOCUS AREA #1- _____

Strengths	
Weaknesses	
Opportunities	
Threats	
Trends	

FOCUS AREA #2- _____

Strengths	
Weaknesses	
Opportunities	
Threats	
Trends	

FOCUS AREA #3- _____

Strengths	
Weaknesses	
Opportunities	
Threats	
Trends	

SMART GOALS

SMART Goals are a great way to completely and thoroughly set goals. Below are questions to help you understand each component.

S—Specific.
Are there clear initiatives identified?
Does the goal have set numbers?

M—Measurable.
How will you be able to tell this goal has been achieved?
How can you track this goal?

A—Attainable.
Is this goal possible?
Is this something we can accomplish?

R—Relevant.
Is this goal necessary and important to us?
Does it align with our overall mission/vision/purpose?

T—Time-Bound.
Is there a set deadline?
When will this goal be achieved by?

EXAMPLE SMART GOALS

The Chapter will recruit 15 new members for the Fall 2021 term.

The Treasurer will collect 100% of the billed dues by October 1.

The Chapter will host 1 community service event by the end of the term with at least 75% chapter participation.

DEVELOPING THE PLAN

Now you will have the opportunity to chart out your plans. Use the table provided to create at least 5 goals for the Chapter.

- Write the SMART Goal at the top first
- Then write why that goal is important and what the actual problem is making sure to identify the root cause
- Create the action plan for how to meet the goal along with when it will be done and who will be responsible for it
- Lastly, provide any resources and potential obstacles
- Make sure that you are setting both short- and long-term goals for the chapter.

THE GOAL

Why is this Important?	What is the Problem?

Action Steps	When	Who
1.		
2.		
3.		
4.		
5.		

Resources	Potential Obstacles

THE GOAL		

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THE GOAL		

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Resources	Potential Obstacles	

IMPLEMENTATION

Now that you have the Chapter Goals set, it is time to put it into action. Reflect on the following questions and write your responses.

How will these goals be shared with the entire chapter?

How will you monitor progress on these Goals?

When should the Chapter develop new/additional Goals?

How will you transition these Goals as new officers are elected?

What additional support do you need to achieve these Goals?