

Alpha Gamma Rho Fraternity

Chapter Strategic Planning Guide

Workshop Topic: Chapter Long Range Planning.

Objective of Session: To prepare Chapter Officers and Advisers to develop Chapter Long Range Plan

Introduction: Summary of comments from general session regarding long range planning.

1. Board of Directors is providing leadership in development of Fraternity long range plan.
2. Fraternity has a Long Range Planning Committee.
3. Board of Directors has developed National Plan.
4. Strategic planning principles have been used.
5. Proper inputs have been considered in the planning process.
6. Fraternity has National goal of fully developing the planning process.
7. Next step is to introduce planning process to local chapter leadership.

Discussion Questions:

1. What is long range or strategic planning?
2. Why is it important to plan for the future?
3. What examples of long range planning are already evident at your chapter house?
4. Do any of you have a written plan with goals and objectives identified for your chapter?

Strategic Planning

Strategic planning is simply the activity through which we as a Fraternity can better prepare ourselves for the future. Many of the daily decisions and actions taken by chapters, Alumni Corporations, Fraternity leaders and others have consequences which will be realized only in the future, so in some sense all such activities involve preparation for the future.

Strategic planning involves our most basic and important choices -- specifically, the choice of our mission, objectives, strategy, policies, programs, goals and strategic resource allocations. These basic strategic choices, taken together, will largely determine our direction and success as a Fraternity in the future.

Objective of Planning Process

Answers questions:

Where are we?

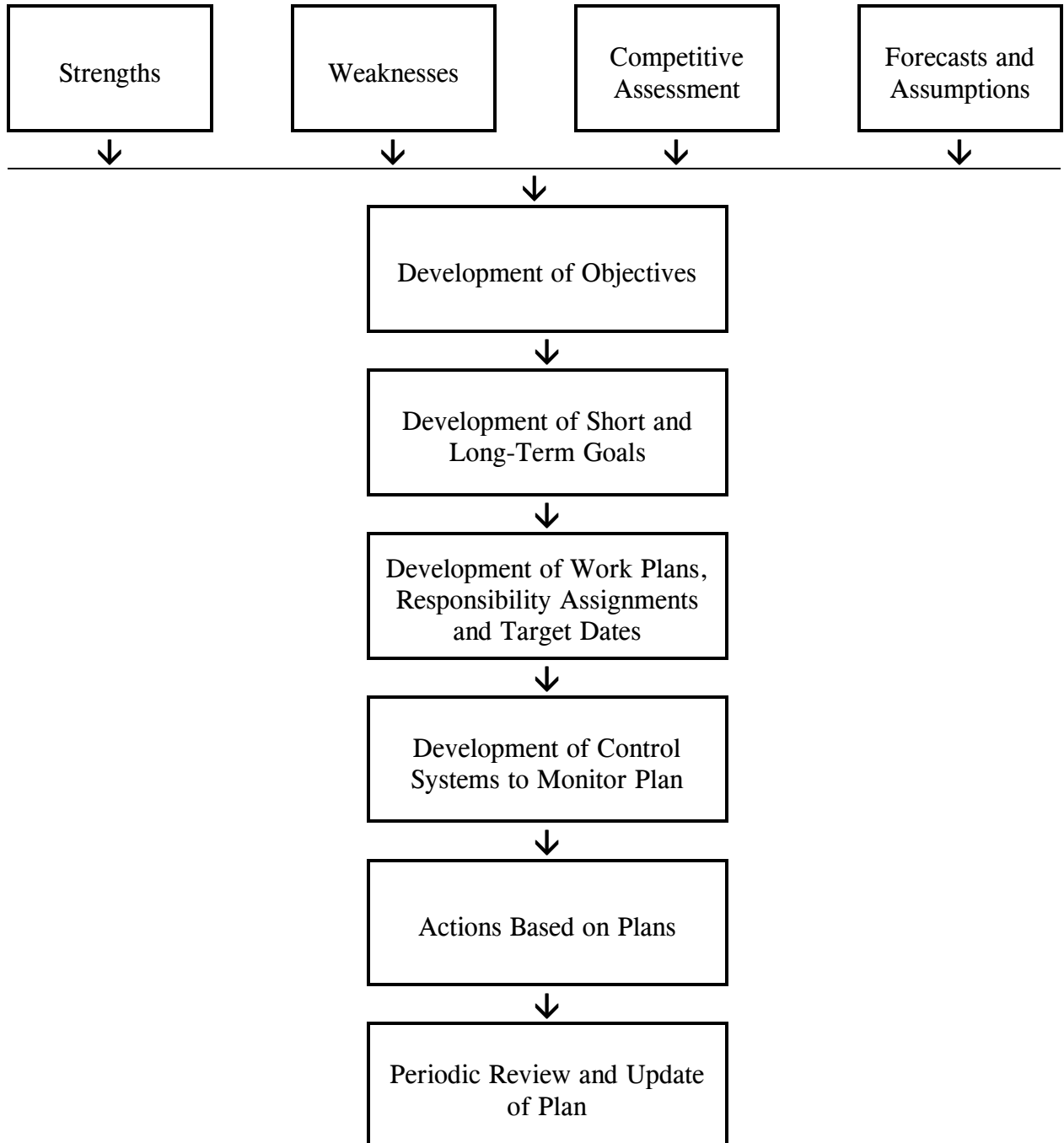
Where do we want to be?

How do we get there?

Strategic Decision Elements

Mission:	The business the organization is in (AGR Purpose)
Objectives:	General things an organization wishes to accomplish
Strategy:	General Direction in which objectives are to be pursued
Policies:	Broad Guidelines to guide tactical decision-making
Goals:	Narrow, specific, timely things to be sought
Programs:	Resource consuming collections of activities through which strategies are pursued to achieve objectives
Strategic: Resource Allocation	Allocation of resources to program through budgets

Steps In Planning Process



Inputs of Planning Process

Input	Definition	Importance to Planning
Strengths	Characteristics which enhance the effectiveness of the organization.	Provide an inventory of areas for which programs may be structured that are designed to capitalize on the capabilities of the organization in the attainment of objectives.
Weaknesses	Characteristics which limit effectiveness of the organization.	Provides an inventory of areas for which programs can be structured and designed to improve performance, and contribute to the attainment of objectives.
Competitive Assessment	Identifies organizations or activities filling same need.	Identifies major obstacles to overcome in obtaining objectives.
Forecasts and Assumptions	Involves analysis of environmental factors (those forces over which an organization has little control). May include social, political, technological or economic factors.	Identifies clues as to the future. Provides indicators such as enrollment trends, attitudes towards fraternities, recruiting obstacles, etc.

Exercises

List strengths of Local Chapter

List Weaknesses of Local Chapter

Competitive Assessment - Describe what your Chapter is competing against.

Forecasts - Assumptions - How would you describe the environment within which your Chapter will operate.

(Exercises continued)

Give some examples of possible short-range Chapter objectives (0-2 years).

Give some examples of possible long-range chapter objectives (2-6 years).

Give an example of a possible short-range objective for an Alumni Corporation (0-2 years).

Give an example of a possible long-range objective for an Alumni Corporation (2-6 years).

Steps in Development of Chapter Plan

Timetable

- Week 1 Become familiar with National Plan.
- Week 3 Appoint Chapter Long Range Planning Committee (include Adviser, selected Chapter offices or members and Alumni Corporation representative).
- Week 6 Follow planning process-
- a. Develop inputs
 - Identify Strengths
 - Identify Weaknesses
 - Competitive Assessment
 - Forecasts and Assumptions
 - b. Determine Chapter Goals (use National Plan as guide).
 - c. Develop short and long-range objectives (use National Plan as guide).
 - d. Develop work plans (outline of tasks to accomplish each objective).
 - e. Assign responsibilities.
- Week 10 f. Establish target dates for accomplishment of objectives.
- g. Communicate plan to chapter membership including Alumni. Send copy to National Headquarters and your Regional Vice President.
- Quarterly h. Monitor Plan to check progress. Find out why tasks are not being accomplished. Get back on track.
- Annually i. Update plan as needed. Review at least once a year.

Utilize National Resources to help (National Staff and Regional Vice Presidents).
Planning Assistance will be part of future Chapter visits.

Remember: Keep it simple.

- Make your plan reasonable and obtainable.
- Involve people who must accomplish plan.
- Build support for plan within membership.
- Do your best to obtain objectives.
- Enjoy results of your efforts.

Alpha Gamma Rho Planning Worksheet

Objective: _____ Responsible Brother _____
 Goal: _____ Scheduled Start Date _____
 _____ Scheduled Completion Date _____

List Projects Tasks and Subtask	Methods to be used	Responsibility and Coordination Points	Target Compl. Date	Actual Compl. Date	Status - Remarks

Chapter Plan

Chapter _____

Date _____

A chapter plan is designed to help a chapter discuss, define and then reach goals. The idea is to prioritize goals the chapter wants to reach. This form is designed as a tool for the Noble Ruler to discuss possible goals with other chapter members. A copy should be completed on a semesterly basis and a copy supplied to the Chapter Consultant when he arrives for his visit.

What is to be done?	Target Deadline
A. PRIMARY	
1.	
2.	
3.	
4.	
B. SECONDARY	
1.	
2.	
3.	
4.	
C. TERTIARY	
1.	
2.	
3.	
4.	