



Sigma Tau Gamma Fraternity | Foundation | WPN Housing

2020 STRATEGIC PLAN

Introduction

The Sigma Tau Gamma Strategic Plan for 2015 – 2020 was developed through a twelve-month process that incorporated the ideas, perspectives, and priorities of the Board of Directors, Foundation Trustees, Headquarters Staff, Fraternity/Sorority Advisors, parents and friends of Sigma Tau Gamma, alumni, and undergraduates. The process culminated in an immersive discussion during the spring 2015 Board of Directors meeting in Warrensburg, Missouri at which the CEO presented data collected earlier in the process and during his chapter visits. At the spring meeting, the Board reviewed and offered initial feedback on the proposed plan, but were allowed two additional months to assess the proposal.

Initially, the objective was to approve the 2020 Strategic Plan at the Board of Directors meeting during the face-to-face meeting at the National Leadership Conference in Norfolk, Virginia. The CEO shared with the Board that in order to complete the plan we needed more data, specifically data around the vision and purpose of the organization. As research now indicates the members want a stronger brand with a clear vision and purpose for the organization. In April 2015, the Board of Directors agreed to hire Rhyme and Reason Design, an Atlanta based company to assess our brand and messaging. Through a number of focus groups, interviews, and surveys they completed their work in October 2015. The results from their work is what has allowed us to finalize it and begin the process of putting the plan into action.

The new Sigma Tau Gamma strategic plan builds on the previous strategic plan (covering the period from 2010 – 2016) and responds to issues, challenges, opportunities, and environmental factors anticipated during the next five years. It was developed within the context of, and with respect for the fidelity toward, the Fraternity's traditions and principles.

The Fraternity's CEO in conjunction with the Board of Directors and Headquarters Staff designed and implemented the strategic planning process.

Method and Timeline

- The CEO reviewed Sigma Tau Gamma documents to identify potential issues, concerns, opportunities, and challenges germane to the strategic planning process. These documents included the Board of Directors Policy Manual, Foundation Trustees Policy Manual, Sigma Tau Gamma Strategic Plan (2010 – 2016), Branding Committee Report (2009), Chartering Task Force Report (2013), Task Force Report (2010), Volunteer Recruitment Plan (2001), Website Task Force Report (2001), Sigma Tau Gamma Constitution and Laws, CEO Monitoring Reports (2010 – 2014), and the SAGA Magazine (2010 – 2015).
- The CEO conducted preliminary interviews with the National President, National President Elect, four members of the Board of Directors, Immediate Past CEO William Bernier, ten past National Presidents, current and immediate past Foundation Presidents, three Regional Vice Presidents, and six District Directors, and the immediate past Director of Chapter Services. The Headquarters Staff also participated in multiple conversations about the plan and its direction. The purpose of the interviews was to collect perspectives, opinions, comments, and feedback about Sigma Tau Gamma programs, services, operations, goals, and priorities. The CEO used the narrative data from these interviews to create tentative planning themes, which then supported the development of questions for in-person discussion with the Board of Directors in April 2015, and again in July 2015, during their face-to-face meeting. Additional questions were discussed during an October 2015 in-person immersive session with Rhyme and Reason Design and the leads of three Boards as a means to better define the comprehensive rebranding efforts.
- Sigma Tau Gamma Board of Directors met on Friday, April 24, at the Marvin Millsap Sigma Tau Gamma Headquarters in Warrensburg, Missouri. The CEO presented initial thoughts and the summary of data that had been derived from his interviews and chapter visits. The eight members of the Board of Directors and the Foundation President participated in intentional, strategic discussions to inform the creation of the Fraternity's vision, purpose, goals, and objectives. The National President Alyx Parker and CEO Steve Latour facilitated the discussion.
- Rhyme and Reason Design administered, collected, and analyzed data from focus groups, interviews, and from an alumni and undergraduate online survey. In October 2015, they produced a report titled 'Comprehensive Organizational Redesign Research and Immersion'. This information played a significant role in further developing and revising our organizations' messaging.

Executive Summary

As our centennial year approaches, we are reminded of the sacred trust and duty bestowed upon us to ensure that Sigma Tau Gamma endeavors forward for generations to come.

The responsibility for building a noble generation of men has been passed down from one Sig Tau generation to another for more than 95 years. Today, we are well positioned to honor and make good on this promise, but like any great and noble cause, we need to significantly grow our base of support to make it happen.

Now is the time to prepare ourselves for the next generation who is yet to come – whose faces we may never see ourselves. All we have to do, is pick-up the sword and shield that has been left for us and carry it forward with conviction, passion, and purpose.

The Sigma Tau Gamma Board of Directors has embarked upon a significant effort to envision the future and position of Sigma Tau Gamma to meet its future from a position of strength. In the paragraphs that follow, we describe the steps on which we endeavor to take our Fraternity.

By the late 1990's we had become well versed on the Millennial Generation. It was first thought that the Millennials would be a generation that would generally not go Greek because of the fraternity stereotypes of hazing, alcohol abuse, and poor academics coupled with the reality that there is a lot of competition on campuses today for extracurricular and co-curricular activity. They proved the skeptics wrong – from 2000 until 2015, fraternities and sororities across America have seen unprecedented growth in membership. The last of this generation will graduate from college in the next two to three years. They are likely to become our most involved segment of alumni and are expected to be significant donors to philanthropic and charitable causes. The need for a plan to ensure their continued engagement in the fraternity is critical to our future.

In 2015, a new generation of students began to join our fraternity. Gen Z is part of a generation that is global, social, visual, and technological. They are the most connected, educated and sophisticated generation ever. They are the up-agers, with influence beyond their years. They are the tweens, the teens, the youth, and young adults of our global society. They are the early adopters, the brand influencers, the social media drivers, the pop-culture leaders. They comprise nearly 2 billion people globally, and they don't just represent the future, they're creating it.

Gen Z's have been born into the crisis period of terrorism, the global recession, and climate change. They are predicted to spend their young adult years in a time of economic and social renewal. They are also living in an era of changing household structures, and are the students of today and university graduates, employees, and consumers of tomorrow.

What early research indicates about this generation is that they want to have a role in creating a better society and that they view fraternities as a way to make that happen while gaining the personal and professional development they know they are going to need to be successful in the future. This is the first generation with strong skills in financial management who appreciates putting the work in. They know success is not guaranteed to them.

Sigma Tau Gamma is therefore well positioned to offer the kind of experiences that this new generation of men are seeking in college.

We now stand at a crossroads created by a confluence of sociology and changing social norms. Down one path lies an accelerating spiral into irrelevance, dwindling membership, and eventual demise. Down the other path the opposite will be found. The choice seems simple, the alternatives clear.

Yet we continue to struggle with how to steer our brotherhood down the path to a larger, more economically viable organization that unequivocally meets its purpose... to build a noble generation of men. In part, this inability to choose the right path is driven by a business model wherein each chapter, as a franchise of Sigma Tau Gamma Fraternity, is organized and operated by 18 to 21-year-old shareholders. The ability of the national organization to influence the day-to-day decisions of these shareholders and thereby steer our individual chapters toward the correct path is extremely limited. This structural weakness must be rectified to the extent practical.

At the core of this challenge is the reality that we have lost touch with the core values and principles that define us as a brotherhood and give purpose to our organizational experience. These values, as defined by our founders 95 years ago, have been so shrouded in secrecy they are only routinely discussed twice per year during initiation ceremonies. Their meaning is no longer in front of the decisions they make in day-to-day life. Furthermore, our principles no longer serve as the foundation upon which our chapter and personal decisions are based. This reality has resulted in a loss of focus on our purpose as an organization, what we stand for and why we exist. It is this purpose that provides the relevance we must maintain if we are to survive and grow in the years to come.

The strategic plan lays out a roadmap for reunifying our fraternity's actions, programs, and priorities with our core values and principles at the national, regional, and local level. It incorporates a traditional strategic planning model to identify the attributes and needs of today's college students. From this plan, the implementation and metrics to quantify the success of the changes outlined herein will be developed by the CEO. By executing this plan, we will again become relevant to a broader cross-section of college age men seeking to learn and grow, men who want every advantage to become the greatest versions of themselves while seeking out Sigma, Tau, and Gamma.

To be successful in reaching our vision we must therefore, evolve and move beyond our competition to show this generation that being a member of Sigma Tau Gamma Fraternity will add value to their personal, academic, and professional lives. To that end, we have developed a vision statement to guide and focus our organizational efforts over the next several years. Now is the time to make the long overdue institutional changes necessary to ensure that our horizon continues to lean forward.

Our Vision

Building Noble Generations of Men.

A Sig Tau knows that life is about growing to your own personal best, growing to greatness. He doesn't just happen upon us; he is chosen from among our friends to be called our Brother. He is then shown the deeper meaning behind our outward principles – principles which give our men every advantage to make each day count, the knowledge to strive for one's personal goals, and the will to be courageous. What a Sig Tau believes, shapes who he is and informs his every action.

A fraternal experience committed to building a generation founded upon nobility remains the principle benefit of membership in Sigma Tau Gamma and the one definitive element that differentiates us from other fraternal organizations on campus.

By the very definition of the word *noble*, those not affiliated with Sigma Tau Gamma will know that we provide values-based leadership development opportunities to our members. With the vision as a backdrop, we have developed a purpose statement, which will focus our efforts.

Our Purpose¹

To be a fraternity of courageous and noble gentlemen who always endeavor forward.

Having courage is the most important thing any man can do, it is a foundation, because without courage you cannot practice any of the principles or strive to be a high-performing noble gentlemen.

It is our duty to provide a spontaneous and joyous welcome to each and every man who wants to call himself a Sig Tau. By creating that kind of environment, we will foster the best within each and every member, thereby giving them a path to pursue wisdom all through life. It is that commitment to better oneself that will give them the will to endeavor forward – always.

We cannot reach our vision or exemplify our purpose if the products and services we offer are not **relevant** to our members, **replicable** across chapters and time, and **recognizable** as ours so as to be discernable from our competition. These 'Three R's' will become the litmus test against which we will allocate resources in the months and years to come.

¹ A **purpose statement** documents the fundamental reason for your existence from a business perspective. It is the motivational force that drives what you do. Purpose goes deeper and will outlast the product you are selling or a business goal you are striving to achieve. In essence, it is your reason for being; why you do what you do. A **mission statement** is a written declaration of an organization's specific focus that may shift over time as the market and environment changes. It answers the questions "What do we do?" and "For whom do we do it?"

Principles of Noble Gentlemen

Through a pursuit of wisdom and commitment to purpose, a Sig Tau will experience and live out each of our Principles demonstrating an abiding spirit in which all things in life are done and possible.

LEARNING

He is committed to the pursuit of wisdom and seeks to afford the environment for learning in all his personal and professional endeavors. He knows full well the obligation he has taken and seeks to pass what he has learned to others, knowledge that will rule and mold his thoughts, acts, and deeds. He is focused and goal-oriented.

INTEGRITY

He lives a life of personal integrity perfecting a structure of honor and living by the highest standard that keeps our Brotherhood alive, for, without it, we could not rely on each other or advance our cause. A man with integrity is an honorable man who lives up to promises made – to others and himself. He is confident, ethical, and honest.

EXCELLENCE

He consistently strives for superior performance and does not shrink from adversity or lofty goals. He is a man who is dedicated and purposeful who carries an unblemished reputation among men. His actions serve as an example and standard bearer for others. He is curious and bold.

LEADERSHIP

He is compelled by a sacred trust and duty to develop good leaders for the world. He is a man who is humble and makes others feel like they are truly part of something special. He is the defender of good from evil. He is always prepared to lend assistance to a Brother in need. He is courageous, innovative, and strategic.

CITIZENSHIP

He is an outward defender of the common man and cares about more than just himself, demonstrating an unwavering commitment to serving his fraternity, college, and country. He is charitable in the broadest sense of the word, knowing those so richly blessed have an obligation to serve those less fortunate. He is generous and kind.

BROTHERHOOD

He loves his fraternity and seeks to enhance the worth of belonging for others. His actions are emblematic of our shield, a protector of our secrets and our life-long commitment to one another. He holds our ideals in high regard and is forever bonded within the Chain of Honor. He is respectful and dignified and proudly represents the fraternity in all his affairs. He is loyal and proud.

Our Goals

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| Goal A: Growth |
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Expand the number of chapters and associate chapters, increase overall membership and resources, and demonstrate a significant investment in charitable service.

Objectives

- 1.1 Expand Fraternity membership by increasing the numbers of chapters and associate chapters on college and university campuses.
- 1.2 Expand Fraternity membership by 25% from the 2014-15 academic year baseline by increasing the number of individual chapter and associate chapter members on college and university campuses.
- 1.3 Each chapter and associate chapter will have access to recruitment resources designed to support our purpose and contribute toward reaching our vision.
- 1.4 Increase non-dues revenue to ensure that all aspects of Fraternity growth are supported by necessary infrastructure, fiscal and other resources, and staffing.
- 1.5 Raise \$2 million dollars for charity by 2020, and conduct 500,000 total hours of community service. Unify charitable donations through the Foundation to submit larger annual donations.

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| Goal B: Alumni and Parent Engagement |
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Increase the number of engaged alumni and parents, alumni associations, and post college resources. Develop a Chapter Advisory Team for each chapter and associate chapter.

Objectives

- 2.1 Augment the number of alumni who are engaged with local chapters by enhancing volunteer opportunities that encourage and maintain strong and sustainable connections with local Sigma Tau Gamma chapters.
- 2.2 Create a regional structure of volunteers that supports locally engaged alumni and parents as well as supports alumni associations.
- 2.3 Every chapter and associate chapter will have a Lead Advisor appointed by the CEO who will be responsible for implementing a Chapter Advisory Team.
- 2.4 Lead Advisors will be provided with an opportunity for training specific to their role within six months of being appointed.
- 2.5 The roles and responsibilities of the Chapter Advisory Team will be properly documented and effectively communicated across all communication channels.
- 2.6 Alumni will be given the opportunity to serve as a mentor to an undergraduate Brother; assisting in the journey to self-awareness and the transition to post-academic life.
- 2.7 Each Brother transitioning to alumni status will renew that special bond of brotherhood through participation in an appropriate event or ceremony.
- 2.8 Each Brother transitioning to alumni status will fully understand the benefits of continued involvement in the Fraternity and the opportunities to volunteer time and/or treasure to support the organization's purpose.
- 2.9 Each Brother will have access to resources that address some of the practical challenges encountered during the transition to post-academic life.

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| Goal C: Membership Development |
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Provide relevant and holistic development experiences that promote our values and align with our principles.

Objectives

- 3.1 Design and deliver programming that contributes to undergraduate member learning, retention, and success.
- 3.2 Expand leadership development programs, experiences, and positions for undergraduates and alumni.
- 3.3 All chapter leadership position manuals will be reviewed for congruence with purpose, marketing message, and will be readily available.
- 3.4 Every chapter or associate Chapter Executive Board member will receive timely training on their role and responsibilities in fostering a principles-based chapter culture.
- 3.5 A Standards Board will be adopted by all chapters and associate chapters to consistently enforce member safety policies.
- 3.6 Every chapter and associate chapter will employ a nationally developed new member program that is compliant with NIC standards.
- 3.7 Every chapter will conduct a nationally developed post-initiation ceremony ritual review, led by an alumni volunteer.
- 3.8 Each Brother will learn the discipline necessary to be academically successful.
- 3.9 Every Brother will understand the responsibilities and ramifications associated with alcohol consumption and other high risk behaviors.

Invest in the infrastructure and human resources needed to achieve this plan.

Objectives

- 4.1 Acquire, develop, and retain the best possible national staff of all fraternal organizations; offer competitive benefits and wages.
- 4.2 Develop and maintain a current set of procedures for every day duties and process as well as maintain a policy manual for Headquarters policies not specified in the Constitution or Laws.
- 4.3 Have a robust and resource oriented website; build and update our online resources for undergraduate and alumni, including best practices and career development.
- 4.4 Invest in the infrastructure, location, and capacity of staff and volunteers.
- 4.5 Improve the quality, frequency, and breadth of media channels to provide reliable and relevant communications to our membership and constituents.
- 4.6 Produce high quality articles for the *SAGA Magazine*.

Increase the number of charitable gifts given to the Foundation for the development of scholarships and leadership programming.

Objectives

- 5.1 Create a consistent and compelling fundraising message that is delivered through a diversified communications strategy in an effort to increase our average gift size and attract new recurring monthly donors.
- 5.2 The Foundation will improve its fundraising efforts and donor statistics to meet or exceed the annual industry average as stated by the North-American Interfraternity Foundation (NICF).
- 5.2 Promote a culture of sustained giving through monetary donations from undergraduates, alumni, parents, friends, and board members.
- 5.3 Increase participation of previously underrepresented membership and friends of the Fraternity in annual fund and lifetime giving societies.
- 5.4 Increase volunteer participation in the cultivation and solicitation of donors in support of the Foundation.
- 5.5 Create a robust plan to acquire new estate gifts and charitable funds.
- 5.6 Conduct a centennial capital campaign that more than doubles the total assets currently available.

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| Goal F: WPN Housing Company |
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Enhance the undergraduate fraternity experience by providing assistance and support as it relates to housing or other forms of shared living/meeting space.

Objectives

- 6.1 Significantly increase non-dues revenue to better support chapter housing on campus whenever possible.
- 6.2 Maximize housing revenue via properties that are attractive to members, filled to capacity and competitive with on-campus and off-campus options.
- 6.3 Maximize energy-cost savings via environmentally friendly practices at all facilities.
- 6.4 Become the go-to organization for best practices in all aspects of fraternity housing management.