

Officer Transition Retreat
FACILITATOR GUIDE



phi gamma delta



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FACILITATOR INTRODUCTION

Perhaps the most important job in the Fraternity is your job as a graduate advisor. You are entrusted with responsibilities to the parents, the graduates, the school administrators, the officers, the International Headquarters and the undergraduate brothers. The men in the chapter look to you for guidance; your time is a valuable asset to them. Therefore, they have a responsibility to the Fraternity and to you.

Continuity for the chapter rests with you, the Purple Legionnaire. Maintaining continuity is one of the greatest opportunities and challenges you have with the chapter. Among college fraternities, there are wide variations in both size and mode of operation. The common denominator that binds these groups together is the fact that each of them is organized to operate, more or less as an autonomous unit in which the major responsibility for successful operation of the group, as a group, is carried by the members themselves.

Without question, the chapter advisor is one of the most important positions in determining the chapter's overall quality of life, guiding the chapter as an organization and counseling individual brothers. Therefore, we call upon you to assist your chapter by facilitating an effective *officer transition retreat* that will help set the pace for the upcoming year.

Why is an Officer Transition Retreat important?

Over the span of Phi Gamma Delta's history we have discovered that there is one common ingredient that the Fraternity has identified which is necessary for maintaining consistency in chapter operations and achieving overall success. Of course, many variables play a role in the chapters' success, but an *effective officer transition retreat*, along with leadership training is monumental. The impact is obvious.

Our goal is to provide you with the necessary materials to execute a successful officer transition and/or leadership training retreat. This manual has also been created to assist you, the facilitator, in making the retreat fun and effective for undergraduates.

You will see on the example Retreat Agenda (page 8) that this retreat layout is a fully loaded vehicle for a successful officer transition. ***However, it is evident that the full agenda may be too long for your needs or desires.*** Therefore, this facilitator's guide is set up in a way such that you, the facilitator, can adapt the format to meet your needs and the needs of the group. Feel free to choose which discussion sections and exercises that would best fit the new officers' needs. However, we highly suggest that the officers ***at least*** discuss/examine the topics concerning: The Mission of Phi Gamma Delta, the chapter's own mission, officer roles and responsibilities, effective transitioning with the previous officers, cabinet roles and responsibilities, living the Ritual, SWOT analysis, and strategic planning.



Retreat Basics - Planning an Officer Transition Retreat

Who should attend the retreat?"

This one is easy – the incoming and the outgoing officers.

Do the outgoing officers really need to stay for the entire retreat?

No, it is probably best if they are only present for a few discussion sections. However, they do have a responsibility to be there when needed. As you will see on the Example Agenda (Page 8), a great time to have the outgoing cabinet participate is during a "working" lunch. When they arrive, facilitate a discussion based on the memos that they will prepare prior to the retreat (memos are explained below). This is a great time for both the incoming and outgoing officers to share ideas, struggles, aspirations and tips.

Pick a location

Setting the right environment for your officer retreat is important, so that the group gets the most out of their time together. It would be most beneficial to get away from the chapter house and possibly campus. Going to an unfamiliar place is a nice change of scenery that will encourage the brothers to be creative thinkers. Remember, you want this time to be productive and fun, so be sure to pick a place where distractions will be at a minimum.

Examples: Company's Boardroom, Graduate brother's house, IHQ conference room, university boardroom, etc.

How long should the retreat last?

This material was created with a full day (6-8 hrs) retreat in mind. However, the material can be adjusted to meet your needs. The important thing, however, is that you prepare the appropriate amount of material for the amount of time dedicated to the retreat. Otherwise, you may not cover the material thoroughly enough to make it effective.

What should the undergraduates do in preparation for the retreat?

Each *outgoing* officer should do the following:

- 1) Assist the Purple Legionnaire in preparing their Officer Notebooks which will include:
 - All current forms relative to the office
 - Record of activities over the past year
 - Record of activities over the past year
 - Calendar of the past year
 - Recommendations for the coming year
 - Resources relevant to the office
 - Other pertinent "campus" information – who to contact to reserve a room, etc.
- 2) Write a memo to the incoming officer in which the following questions are answered:
 - What problems or stumbling blocks did you encounter as an officer?
 - How were these problems or stumbling blocks dealt with?
 - What aspects of your term went well?
 - What recommendations to you have for the incoming officer?
 - What unfinished business must be addressed?

Each *incoming* officer should do the following:

- 1) Review officer responsibilities as listed in Chapter Operations Manual.
- 2) Prepare a memo in which the following questions are answered:
 - What is the purpose of my position?
 - What are my responsibilities?
 - How can I improve what the former officer accomplished?
 - What new/old programs do I plan to utilize during my term?
 - What do I want to accomplish in the short term (3 goals)?
 - What are two or three actions items I must accomplish to complete these short term goals? What is the projected date of completion for those goals?
 - What do I want to accomplish in the long term (3 goals)?
 - What are two or three action items I must accomplish to complete these long term goals? What is the projected date of completion for these goals?
- 3) Bring a Ritual Book for each officer.

Each officer, both incoming and outgoing should bring the completed memos to the retreat.



What materials will you need during the retreat?

Retreats take a lot out of those involved. So you'll want to keep your brothers happy as they spend their time brainstorming and debating ideas for the benefit of the chapter. Snacks, soda, and water are necessities for retreats. But also remember that the officers will need pens, paper, markers, flip charts and binders to keep their thoughts organized. Lunch will need to be ordered and delivered about half way through the retreat.

The Fraternity of Phi Gamma Delta Ingredients for Officer Notebooks

In addition to paper and pens, each officer will need a resource binder to use during the next year. Use of these notebooks can save time and provide resources for the chapter. Primarily, they will be used as a reference guide. However, they also can play a key role in keeping track of responsibilities and recording the duties of each cabinet member.

You, as the facilitator, are tasked with compiling each binder so that they are ready for use during the retreat. The organization of an effective notebook is very simple.

The notebook may be divided into several sections by binder dividers. Typically, each notebook will include: contact information, officer responsibilities, record of semester goals and accomplishments for the year, day-to-day log of the past officer or chairman's activities, and reference materials and materials collected from conferences, conventions, campus resources, etc.

Materials and Layout

- ☆ **Binder:** Large three ring binder with plastic slipcovers and inside pockets
- ☆ **In slip cover:** Sheet stating school, fraternity, chapter, and "Chapter Officer Notebook." You should also include the word "confidential" because you will be including a copy of the chapter bylaws.
- ☆ **In inside pocket:** "Calendar for Officers"
- ☆ **In binder:** basic three-hole punched 16 month calendar
- Index tab: titled: "Contact Information"
 - ☆ Include contact information for PL, BCA, HC, etc.
- Index tab: titled: "Officer Responsibilities"
 - ☆ Chapter officer descriptions – *Chapter Officer Nuts and Bolts*
- Index tab: titled: "Goals and Objectives"
- Index tab: titled: "Roster"
 - ☆ Chapter roster including college and home addresses
- Index tab: titled: "Monthly Reports"
 - ☆ Summaries of all committee/officer work in progress
- Index tab: titled: "Budget"
 - ☆ Simplified semester budget in slipcovers
- Index tab: titled: "Committees"
 - ☆ Committee names, chairmen, phone numbers, and email
 - ☆ Organizational Chart
- Index tab: titled: "Bylaws"
 - ☆ Complete Chapter Bylaws
- Index tab: titled: "Risk Management"
 - ☆ Phi Gamma Delta's Risk Management Policy
 - ☆ Risk Management Manual

For more information on this program contact:
 J. B. Goll, Director of Chapter Services
jgoll@phigam.org
 859-255-1848

How the Retreat Works – Facilitator’s Guide

On the following pages you will find an agenda and the **Officer Transition Retreat Facilitator’s Guide**. Each new officer should receive a bound copy of the **Officer Transition Retreat Participant Workbook**, along with an Officer Notebook. The participant guide is very similar to the facilitator’s guide; however, the facilitator’s guide includes important commentary, prompt questions, and instructions that should be used to facilitate the program.

How do I know which pages appear only in my facilitator’s guide?

The **Officer Transition Retreat Facilitator’s Guide** has instruction pages that interject before each section of the retreat program. (For example, see page 8, 12, etc). These pages include the word “FACILITATOR” on the top right corner, followed by sequential number.

Where do I start?

Use the agenda as a guide. You may want to adapt the program to meet the needs of the group if need be.

What other resources are there available?

The Officer Transition Retreat is designed to facilitate a brief leadership training skills session and include strategic goal setting and action planning. As a supplement, there are other leadership programs available upon request. These programs are part of the *Taking the Lead* series, which includes the ***Taking the Lead by DISCovering your Personal Style***. This module helps participants understand the role that personality and personal style – our natural patterns of behavior and preferences -- play in leading others. To request a leadership program or if you have questions, contact Rob Caudill, Director of Education, at (859) 255-1848 or by email at rcaudill@phigam.org.

In addition, you can reference the Appendix for supplements activities and educational resources.

What do you (the facilitator) need to do before the retreat? – A Recap of Responsibilities.

- 1) Secure a location and pick a date.
- 2) Send memo questions to the incoming and outgoing officers.
- 3) Ensure the Office Notebooks have been completed.
- 4) Review the *Officer Transition Retreat Facilitator’s Guide*.
- 5) Obtain a Ritual Book to use during the retreat.
- 6) Create an agenda and print extra copies for each person attending.
- 7) Print *Officer Transition Retreat Participant Workbooks*.
- 8) Arrange for lunch to be delivered sometime during the retreat.

Hints for the Retreat Facilitator

The one thing that is most important for the facilitator to remember is organization.

The following are important points to remember too:

- ☆ Make sure everyone knows when and where the retreat is to be held. Make sure transportation is arranged for those who need it.
- ☆ Take breaks throughout the day. You’ll need them.
- ☆ Try to stick to the agenda, but be prepared to be flexible.
- ☆ Have someone take complete notes for additional evaluation at some later date.
- ☆ Save all materials for reference on later retreats. This eliminates “reinventing the wheel” and aids the next Purple Legionnaire or facilitator when he sets up a retreat.



Officer Transition Retreat Agenda

- 1) Introductions and Background (10 minutes)
- 2) Overview of Retreat; Expectations (10 Minutes)
 - a) Review agenda
 - b) Goals for the retreat
 - c) Approach
 - d) How this retreat works in the bigger picture
- 3) What Is Our Purpose? (45 minutes hour)
 - a) Why do we exist?
 - b) The Mission of Phi Gamma Delta
 - c) Who is Phi Gamma Delta?
- 4) Effective Leadership (30 minutes)
 - a) What does it mean to be an effective leader?
 - b) *Secret Blend of Effective Leadership*
 - c) Characteristics of an effective leader
- 5) Officer Responsibilities (1 hour and 15 minutes)
 - a) Chapter Officer Nuts & Bolts
 - b) Action and accountability
- 6) Cabinet Responsibilities (1 hour and 15 minutes)
 - a) Will effective leaders produce an effective cabinet?
 - b) Delegating authority
 - c) Delegating the task
- 7) Lunch – Working lunch with outgoing officers (1 hour)
 - a) Discuss the memos that both the outgoing and incoming officers prepared prior to the start of the retreat
- 8) The Plan – Create a Strategic Vision for the Future (1 hour and 45 minutes)
 - a) Establish the condition of the chapter – SWOT analysis
 - b) Strategic plan continues – From weak to strong
 - c) Setting the right goals – SMART goals
 - d) Weak area game plan
 - e) Review of committees
- 9) The Plan – Strategic goals and Objectives (1 hour)
 - a) Cabinet goals and objectives: Short and long term
 - b) Mapping out success – Creating the master calendar
- 10) International Fraternity Issues (10 -15 minutes)
 - a) Fiji Academy
 - b) Ekklesia
 - c) Cabinet/Chapter Visit to IHQ in Lexington
 - d) Field Secretary Visits
- 11) Anything Else of Priority to the Cabinet
- 12) R & C

FACILITATOR 1

How this retreat works in the big picture

It is important that we realize that this retreat is the first vital step towards the overall goal of creating a stronger and better chapter. At this retreat, we will lay the foundation upon which the work of the next term/year will be based upon. At this point, the leaders of the chapter will identify the areas of chapter operation they believe need to be addressed, how they can be effective in executing these plans, and how to be the best leaders they possibly the can be.

However, the retreat is only the planning and "talking" stages of the system. The crux (most crucial point) of the operation will come when the officers return to the chapter and begin to apply the principles learned, and communicate the plan of action they have developed. Here are a few things to keep in mind:

1) Following this retreat, we strongly recommend that the officers plan and facilitate a chapter retreat, similar to the same retreat they are participating in right now. At the very least, each officer should meet with their respective committee chairmen to discuss the goals/objectives arrived at during this retreat. The officers should then solicit feedback from the chairmen, which will allow additional input on the strategic action plans. The goal here is to avoid the common problem when newly elected officers charge into the chapter with their own agenda, apparently ignorant of the wants and needs of the brothers.

2) The next step is to have an open cabinet meeting for all committee chairmen and interested brothers so that each chairman can introduce this semester goals and objectives to a small group, in order to solicit feedback. In doing this, the plan should become more specified and refined, and better reflect the interests of the chapter. Also, by having each chairman express his goals and commitments, he will in turn be more likely to hold himself accountable to the group, as they will have heard him express his commitments.

3) This step is similar to #2, except it is done with the entire chapter. After having done this retreat and the two steps above, the strategic vision should be refined enough so that lengthy discussion will not be necessary. However, doing this will allow everyone input and as a result, the confidence of the entire chapter in the officers and committee chairmen will be strengthened.

4) Also, and most importantly, it is imperative that follow-up is done in relation to not only the above steps, but the retreat in general. For this retreat to be truly effective, it must be revisited constantly throughout the semester.

The above (#1-3) is best done the week following the retreat, and the work load should be divided up enough to avoid over-extending any one officer.

It all starts with this retreat. Here we will create the building blocks.



The Fraternity of Phi Gamma Delta
International Headquarters
1201 Red Mile Road
Lexington, Kentucky

Note:
Undergraduate Workbook
Starts Here!

Officer Transition Retreat
Participant Workbook



phi gamma delta

Brothers,

Congratulations on being selected as chapter officers. Being on cabinet is an honor. Your experiences and character have proved you all worthy of such responsibilities. Therefore, the success of the chapter is now in your hands. As officers you will be exposed to a new world of leadership that will undeniably benefit each person individually for years to come. Remember to have fun and make the most of it.

This workbook is designed to help you “retreat” effectively as a cabinet. When you hear the word “retreat,” don’t think of waving the white flag and giving in to all the problems your chapter may be facing. A retreat is an excellent way for members to reflect and evaluate, as well as officers the opportunity to recharge, contemplate, bond, and renew.

GOALS FOR THE RETREAT

Overall Goal

This retreat will empower us to be more effective leaders through helping us tap into some leadership qualities we already possess and defining the responsibilities that we have been assigned. This will in turn enable us to improve the quality of the fraternal experience offered by our chapter through strengthened friendships, greater achievements and more.

- Goal #1 Gain a better understanding of how we can be more effective leaders individually and collectively.
- Goal #2 Construct a comprehensive strategic plan for our office tenure, consisting of specific goals and objectives.
- Goal #3 Create action plans and priorities that serve as a guide for transforming your chapter from *good to Great*.

Our approach to meet these goals

- ☆ Develop a mission statement for our chapter that defines our purpose.
- ☆ Examine our strengths and weaknesses as leaders and how we can improve.
- ☆ Examine the qualities we have as a group and how we can be most effective as a leading body.
- ☆ Assess where we presently stand as a chapter thorough an evaluation of our strengths and focus areas for improvement.
- ☆ Develop a strategic vision for our chapter and a plan to fulfill this vision.

Our steps to success

It is also important for us to recognize that this retreat is only the first step in the process of fully utilizing the following information. In fact, the crux (or most crucial point) will come after the retreat, when you begin taking the ideas expressed in these pages, and turning them into action within the chapter.

Expectations for the retreat

- ☆ Be Honest.
- ☆ Stay Focused.
- ☆ Be considerate of other people.

What is our Purpose?

Why Do We Exist?
The Mission of Phi Gamma Delta
Who is Phi Gamma Delta?



FACILITATOR 2

Why we exist... Exercise

Focus

The focus of this exercise is for the officers to arrive at the group's general definition for the chapter's existence.

Total Time (including discussion)

15-20 minutes

Benefits

- 1) The officers will experience consensus building.
- 2) The exercise forces the officers to think about the true meaning of fraternity.
- 3) You will witness how they interact, who holds most strongly to their positions, who give in easily, etc. This will most likely be a good example of how the group will interact in the future.

Tips

- 1) Hold to the time commitment, this process can very easily take too long.
- 2) Don't let the officers get caught up on the definition of different terms (i.e. "brotherhood"). If a disagreement arises, try to settle it quickly by offering a common definition yourself.

Facilitation Questions

What did you immediately think was important?

What were some attributes that weren't so important?

Does the chapter have a specific purpose?

Were you surprised to find out your peers' rank-orders were different?

How does this purpose relate to The Mission of Phi Gamma Delta?



Why do we exist?

Before we enter serious dialogue on how we are going to lead, it is important to first understand what we are leading and why we are doing it. This exercise will help us understand how each of us sees Phi Gamma Delta and what definition we give to the Fraternity.

While preserving the rich traditions of our past, we need to recognize the responsibility of a college fraternity in a modern university or college. An effective leader must recognize and understand the concept of "fraternity." Once a chapter leader has a grasp of what a fraternity should be, it is much easier for him to give sound advice and be an effective officer.

"A fraternity is an association of men, selected in their college days by democratic processes, because of their adherence to common ideals and aspirations."

-Newton D. Baker

Newton D. Baker
Johns Hopkins 1892, Washington & Lee 1894
Secretary of War



"A fraternity should exist for two fundamental purposes: service to the institution that fosters it and development of its members. Its opportunities for personal development are available in no other college organization and afforded by no other experience in the same short period of time."

-The Purple Pilgrim

Consequently, the question arises, "What does the Fraternity mean to you?" The exercise on the following page will attempt to define an answer and develop a foundation for goals upon which you, as leaders, can build.

Friendship Knowledge Service Morality Excellence

Why we exist...

Rank-order the following reasons for our existence, according to the importance you attach to them. Place a "1" in front of the most important, and "10" in for the least important, etc. You have 5 minutes for this task: DO IT CAREFULLY!

After every officer has finished, discuss your individual rankings, then arrive at a rank ordering (1-10) for the group. You have 10 minutes; do not choose a formal leader.

My Order	Group Order	
_____	_____	a) Phi Gamma Delta exists to help college students develop social maturity.
_____	_____	b) Phi Gamma Delta is committed to improving the quality of life within the campus community.
_____	_____	c) The chapter fosters the development of business and social contacts that will be helpful after graduation.
_____	_____	d) We provide a "home away from home" where everyone is accepted and wanted.
_____	_____	e) We seek to instill brotherhood and friendship in a positive and healthy environment.
_____	_____	f) Participation in fraternity activities facilitates training for leadership in adult life.
_____	_____	g) The fraternity supports and enhances the learning experience of students.
_____	_____	h) Members are treated as adults, not as adolescents who need to be controlled.
_____	_____	i) Chapter functions are laboratories for democratic procedures.
_____	_____	j) Brothers learn to serve and put others ahead of themselves.



Mission of Phi Gamma Delta – “The Mission” Exercise

Focus

The focus of this exercise is to educate (and remind) the new officers about Phi Gamma Delta’s mission statement, and to align the purpose of the chapter’s existence with the overall goals of the Fraternity.

Total Time (including discussion)

15-20 minutes

Benefits

- 1) The officers will experience consensus building.
- 2) The officers will essentially establish a root strategy or mission statement that the chapter should use as its core element when planning a strategic vision.

Tips

- 1) Be cognizant of the time allotted; sometimes too much time can be spent on this exercise.

Facilitation Questions

Why does this chapter at this university/college exist?

What is our primary function?

What are we in pursuit of?

Ultimately, what do we hope to achieve?

The Mission of Phi Gamma Delta

Phi Gamma Delta exists to promote lifelong friendships, to reaffirm high ethical standards and values, and to foster personal development in the pursuit of excellence.

Phi Gamma Delta is committed to provide opportunities to each brother to develop responsibility, leadership, scholarship and social skills in order to become a fully contributing member of society.

This statement defines the basic purpose of Phi Gamma Delta:

The development of our members.

Excerpt from The Purple Pilgrim, page 5

Above you see the mission of our Fraternity. Almost all major corporations and business have some sort of mission statement. In the case of Phi Gamma Delta, this statement clearly defines why our organization exists. It does not necessarily explain how it achieves its goals, but through explaining what it provides a greater purpose is resolved.

Does your chapter have its own mission statement?

By creating a mission statement, your chapter will have a root strategy that defines the purpose behind each chapter operation. More importantly, the use of a mission statement will help build consistency and strengthen the motivation behind each goal; ultimately, your chapter will do a better job at developing its members.

Here are some questions to keep in mind:

- What is the greater purpose for your chapter?
- How do the goals you have in mind relate to The Mission of Phi Gamma Delta?
- Why does the chapter exist at your college or university?
- What function does it have?
- How does it benefit the community?
- How does it benefit its members?
- How does it benefit Phi Gamma Delta?

What is your chapter's mission statement?

Work together as a group and clearly define the purpose of your chapter. This statement will be useful later, during the planning stages of the retreat. Keep it short. Work quickly by not getting too caught up on one particular issue or chapter operation:

The _____ Chapter of Phi Gamma Delta exists at _____ (college/university) to



Who is Phi Gamma Delta?

Focus

The focus of this exercise is to educate each officer about the different entities, staff members, and graduate volunteers that make up this chapter in particular, and Phi Gamma Delta.

Total Time (including discussion)

10-15 minutes

Benefits

- 1) The officers will gain a glimpse of the bigger Phi Gam experience.
- 2) Each officer will learn about who is involved with the overall management of the chapter and chapter house.

Tips

- 1) Keep this discussion fairly short, but provide time for each officer to ask questions.
- 2) Refer to the contact information that should be included in the Officer Notebooks.

Facilitation Questions

What is the primary function of each entity and how does each brother/group benefit our chapter?

How can this cabinet improve communication with each group?

Ultimately, what do we hope to achieve together?

Who is Phi Gamma Delta?

The focus of this exercise is to educate each officer about the different entities, staff members, and graduate volunteers that make up Phi Gamma Delta. Refer to the contact information that can be found in your Officer Notebook.

Purple Legionnaire (PL)

Our Purple Legionnaire is _____

Home Phone: _____ Cell Phone: _____

Email: _____

The role of the Purple Legionnaire is to

Board of Chapter Advisors (BCA)

The role of the Board of Chapter Advisors is to

Some Key Graduates that serve on the BCA are:

House Corporation (HC)

The role of the House Corporation is to

Some Key Graduates that serve on the HC are:

Section Chief (SC)

Our Section Chief is _____

Home Phone: _____ Cell Phone: _____

Email: _____

Field Secretary (FS)

Our Field Secretary is _____

Cell Phone: _____ Email: _____

International Headquarters Staff

See the page 35 in the Appendix to view IHQ Staff members and contact information.

Effective Leadership

What does it mean to be an effective leader?

Secret Blend for Effective Leadership

Characteristics of effective leadership

Timeless Words of Wisdom for Phi Gams

From William S. Zerman Sr. (Michigan 1949)

1. Attitudes are contagious
2. If you want to win...surround yourself with winners.
3. It's not hard to make a decision when you know what your values are.
4. Give more than they ask. Give what they expect and more.
5. Life without commitment is superficial and unsatisfying.

"You do not lead by hitting people over the head - that's assault, not leadership."

-Dwight D. Eisenhower

"The key to successful leadership today is influence, not authority."

-Brother Kenneth Blanchard (Cornell 1961)



FACILITATOR 5

Characteristics of an effective leader

Focus

This exercise takes us from discussion to practical application in the fraternity setting. The officers are now challenged to commonly define what characteristics are most important.

Total Time (including discussion)

15-20 minutes

Benefits

- 1) Facilitates a great discussion on how different characteristics can be utilized.
- 2) Consensus building.
- 3) You will receive insight on each individual's perspectives.

Tips

- 1) Start by reading aloud each element of the *Secret Blend of Effective Leadership*.
*Generate as much discussion as possible.
- 2) The list used is not all inclusive; therefore the discussion draws in more characteristics in addition to those already introduced (i.e. "good socializer"). Things may begin to get "cloudy" at this point simply because so many terms are being used. At the end of this session, it is a good idea to review and organize the key thoughts that have surfaced up to this point.

Facilitation Questions

What does it mean to be an effective leader in the Fraternity?
How can we use this sort of approach to work for this cabinet?
Is there a need for these elements in our chapter?
How does this transfer into chapter management?

What does it mean to be an effective leader?

You have probably heard of several different leadership approaches and techniques by this point in your college career. Phi Gamma Delta is committed to developing each member, especially in terms of leadership. Moreover, in 2003 the Fraternity launched the *Taking the Lead Series* of leadership programs which were created in coordination with Brother Kenneth Blanchard (Cornell 1961), an expert on leadership and organizational skills. Blanchard is coauthor of several useful books, such as *The One Minute Manager*, *Raving Fans* and *Everyone's a Coach* -- all of which we strongly suggest that each officer reads.

In addition to his other best sellers, Brother Blanchard has coauthored a book called the *The Leadership Pill*, which aptly points out some key highlights that you should use everyday as a leader. Several of the highlights are written below.

Notes on *The Leadership Pill*, authored by Ken Blanchard and Marc Muchnick:

THE SECRET BLEND FOR EFFECTIVE LEADERSHIP

- ☆ Leadership is not something you do to people,
It's something you do with them.
- ☆ Leading people is the opposite of trying to control them.
- ☆ Profit is the applause you get for taking care of your customers and creating a motivating environment for people.
- ☆ Sharing the big picture puts everyone on the same page.

INTEGRITY

- ☆ Lays the foundation for trust and respect.
- ☆ "They [effective leaders] show their integrity by behaving in alignment with the same values to which they hold their own teams accountable."
- ☆ Leading with integrity means being the person you want others to be.
 - ☆ Trust is what happens when values and behaviors match up.
 - ☆ People are more apt to trust and respect you when what you say and what you do are one and the same.

PARTNERSHIP

- ☆ Harvests the potential of the team.
- ☆ The key to effective leadership is the relationship you build with your team.
 - ☆ Sharing the big picture puts everyone on the same page.
 - ☆ It is easier to get up the hill when you climb it together.

AFFIRMATION

- ☆ Lets people know that what they do is important.
- ☆ Praise is the easiest way to let people know they are appreciated.
 - ☆ Each of us has the power to recognize the goodness in others.
 - ☆ You will go a lot further if you stop to refuel.

PERFECTING THE BLEND

- ☆ People will think for themselves when you quit doing it for them.
 - ☆ Leadership is the process of getting everyone to the place they are supposed to go.
- ☆ The highest achievement as a leader is winning the respect and trust of your team.

Discussion

Take time to discuss each aspect of the *Secret Blend*.

Characteristics of an effective leader

A large number of factors/characteristics contribute to developing an effective leader. Some of these may be more important than others. Rank the following by order of importance (1-11). Write your own order first (5 minutes), then reach a group order by discussing the five most important characteristics of an effective leader (10 minutes).

MY (1-11) ORDER	OFFICERS' ORDER (1-5)	
_____	_____	A. Decisive, has the ability to make a decision and push it to completion.
_____	_____	B. Persuasive, ability to "sell" a decision/facilitate the adoption of solution.
_____	_____	C. Emotionally stable.
_____	_____	D. Logical, has ability to present ideas and invite questions.
_____	_____	E. Good socializer.
_____	_____	F. Flexible, has ability to make a tentative decision and adapt based on suggestions.
_____	_____	G. Diplomatic ability to keep organization "out of conflict."
_____	_____	H. Respect in the community.
_____	_____	I. Charismatic personality.
_____	_____	J. Analytical, states a problem and seeks suggestions before making a decision.
_____	_____	K. Loyalty to the organization.



Characteristics of an effective leader (continued)

Our cabinet believes the five most important characteristics of an effective leader are:

1.

2.

3.

4.

5.

What are my strengths as a leader?

What are my weaknesses?

How can I improve as an effective leader?

FACILITATOR 6

Chapter Officer Roles and Responsibilities

Focus

This exercise is a core component to this retreat, but a simple topic to cover (in most cases). Here, we need to examine each officer's role, both as a cabinet member and within the chapter, and his responsibilities.

Total Time (including discussion)
40-45 minutes

Benefits

- 1) Each officer will develop a clear picture of the cabinet's functional structure.
- 2) Each officer will be able to discover more about his position, essentially some of the "behind the scene" tasks.

Tips

- 1) Start by having one of the brothers read the Chapter President's description that is found in the *Nut and Bolts* section of the *Chapter Operations Manual*. (Preferably each officer will read a different description than the actual position to which he has been elected.) Have a short discussion about the group's immediate reactions. Then, refer to the Officer Notebooks to find the Chapter President's job description. Then, follow the sequence.
- 2) Have each officer read his oath of duty that is written in the Ritual book.
- 3) Give each officer a chance to write down notes when needed and time to fill in the questions at the end of the section.



Officer Responsibilities

Chapter Officer Nuts and Bolts
Action and accountability

Friendship, the sweetest influence...

Cabinet Responsibilities

Will effective leaders produce an effective cabinet?
Living the Ritual
Delegating Authority
Delegating the task



phi gamma delta

Chapter Officer Responsibilities - Nuts and Bolts

Chapter President

You are THE MAN! Your picture is at the top of the composite for good reason...because your brothers feel you have what it takes to lead the chapter. You have 365 days to get the job done. You have more influence than you realize. Make the most of your opportunity.

You are the total authority

- You will receive questions regarding EVERYTHING
- You are Phi Gamma Delta to many non-Fijis
- Make time for yourself...you need to have a personal life
- You are the key motivator in the chapter
- The attitude and tone of the chapter is most influenced by you
- You should be the sole outside voice for Phi Gamma Delta
- Your attitude and influence spreads quickly
- Appearance, professionalism and timeliness are all important
- Keep an eye on chapter tone
- Utilize the graduate network, especially past Chapter Presidents
- Identify "key players" and informal leaders within the chapter
- Help brothers succeed by assisting them with their plans and ideas for Phi Gamma Delta
- Know your brothers
- Keep it all in perspective!

Chapter Treasurer

Chapter success is ultimately tied to financial success. You hold the keys to the chapter's financial success. Remember, "brotherhood starts when you pay your bill." Be firm, but fair...set your financial goals (budget) and stick to it to keep the chapter in the black. Your role is paramount.

- Your expenditures should follow chapter goals and priorities
- Set up a balanced budget and stick to it
- You need an organized system of accounting
- There should be no financial surprises
- Clear communication regarding finances is key
- The brothers and their parents deserve to know where their money is going
- Document everything
- Utilize your resources and appoint an assistant
- You are not the "lone bill collector"...this is a chapter responsibility following your lead
- Communicate with parents...they are an important part of the financial picture
- Your success factors are...AR's paid, chapter "in the black", good documentation, new Treasurer transition completed
- A chapter can't succeed without good finances!

Recording Secretary

You are the INTERNAL COMMUNICATION facilitator. The means and efficiency of communications within the chapter should be your top priority. This communication should happen daily and not just in your chapter meetings.

- Record is the root word describing your position



- You are the key to our internal communication and documentation
- You are the “owner” of the minutes...be proud of your work
- Minutes should be unique to each Recording Secretary
- You are the parliamentarian...meeting efficiency and business are dictated by the skill with which you perform your duties
- Try an in-chapter newsletter or the use of bulletin boards for communication
- Your success factors are well informed brothers, smooth and efficient meetings, good complete set of minutes, and solid documentation
- Be creative in motivating the chapter for meetings
- Work with the President to set a time limit for meetings
- Make meetings FUN!

Corresponding Secretary

You are the EXTERNAL COMMUNICATOR and our public relations man. Our ability to communicate a positive message and image to our “publics” rests on your shoulders. Remember, people are making first impressions of Phi Gamma Delta 365 days a year - 24 hours per day.

- You need to know your “publics” -- parents, non-Greeks, administration, neighbors, etc...
- Ask yourself, “What is our message?” and “What is our medium?”
- Get a jump on a solid graduate newsletter
- Consider sending your graduate newsletter to other audiences
- You should know the “beat” on campus...know what is going on
- Work in a proactive fashion -- not damage control
- Get to know the local media -- campus and town
- You are the communicator with International Headquarters on forms/reports, etc...
- Communicate!

Chapter Historian

You are the chapter RITUALIST. It is your responsibility to see that the values and ideals of Phi Gamma Delta are understood and exemplified by your brothers. The Rituals of Phi Gamma Delta are the centerpiece of our Fraternity. They deserve thoughtful discussion and teaching.

- You are The Phi Gamma Delta magazine correspondent
- You should monitor the “pulse” of the chapter
- You should see that we are conducting brotherhood building activities
- Keep a journal or log of the activities within the chapter
- *Chapter history
- Scrapbook - keep everything, not just photographs
- Have a plan for Post Initiation Education
- Give the brothers “tidbits” of Ritual at every meeting
- You should be a living example of Friendship, Knowledge, Service, Morality and Excellence
- Live the Rituals!

My position is _____

I am responsible for

FACILITATOR 7

Accountability

Focus

To give the officers a better understanding of accountability and its importance as a chapter leader.

Total Time (including discussion)

10-15 minutes

Benefits

- 1) Can be used as the "theme" for the chapter/cabinet ("Be Accountable").
- 2) Identifies common problems with leaders "not leading by example."
- 3) Identifies common problems in delegation.

Tips

- 1) Generate a discussion about how important it is for each officer to be accountable.
- 2) Solicit feedback from the officers on examples of the lack of accountability within the chapter (or evidence of its existence!) and how the chapter can be improved with more accountability in the members.

Facilitator Questions

Consider having each officer verbally promise to uphold their oaths from the Ritual and promise to hold each other accountable based on ethics, finances, and responsibilities.

What does accountability mean?

How can we achieve accountability as a group?

Why is it important to hold the brothers accountable?



Action and Accountability

Did you know that it is human nature to avoid the very things that will make us the most successful? In fact, most people will do the very minimum that they can get away with, without suffering repercussions or being reprimanded. This is called "following the line of least resistance." People levitate to a comfort zone that exists just above minimum expectations. This comfort zone has a name. It's called:

MEDIOCRITY

For example, for the vast majority of salesmen the key to success is their ability to increase business through prospecting (making cold calls). Yet, some figures show that up to 80% of salesmen avoid this task everyday, despite the fact that they know it is essential. Therefore, it is the other 20% of salesmen that are making 80% of the sales.

Similarly in the Fraternity, the ol' 20/80 rule sometimes applies. It is leadership that makes the difference. Leaders that know the priorities and goals of the group and mobilize the masses towards these goals are the key to a successful fraternity. These leaders are motivated, enthusiastic, and seek a comfort beyond mediocrity. What they are seeking has a name. This is:

EXCELLENCE

One of the most significant differences between mediocrity and EXCELLENCE among groups and individuals is the level of accountability they possess. Just think if every brother did what they committed themselves to. Think of the potential outcome of that scenario.

Lack of accountability in ourselves and others can be seen in numerous areas of the chapter, from attendance at chapter functions, achieving scholarship, paying chapter dues, raising money for charity, or participating in recruitment.

You may ask the question

"How do we hold the brothers more accountable?"

To answer that question, you must first look at yourself.

Are you accountable, as a leader, for your commitments?

Remember that the brothers will follow the examples that are before them. As leaders we must be the most accountable. If you are leading by example, you will find many of the brothers will follow your actions simply through instinct.



FACILITATOR 8

Cabinet Responsibilities

Focus

This exercise is a core component to this retreat as well. Here, we need to discuss the importance of teamwork and how each person plays a vital role in achieving success as a cabinet. *This section should also include a review of Phi Gamma Delta's Risk Management Policy and the university policies as well.*

Total time (including discussion)
30-40 minutes

Benefits

- 1) Each officer will get an overview of the PGD's Risk Management Policy
- 2) Each officer will discover that they will need to work with the other officers to achieve success and make progress.
- 3) Hopefully, the officers will realize the importance of communication.

Tips

- 1) Read different passages from the Ritual book and generate a discussion about its importance. Be sure to identify how each officer can specifically use the Ritual to aid him in his endeavours.
- 2) Refer to PGD's Risk Management Policy that is included in the Officers Notebooks.
- 3) Stress the importance of communication and how it affects every facet of the chapter, especially chapter leadership.
- 4) Give each officer a chance to discuss his thoughts on how the group can function better as a team.

Facilitator Questions

Why do we perform the Ritual? What importance does it have? How can we apply it?
What are five key ways that we can increase our communication with each other?
What will happen if one member of the cabinet makes a group decision by himself?
What are the consequences of everyone not agreeing on issues that directly affect the chapter?



Will effective leaders produce an effective cabinet?

As a cabinet it is inevitable that you will need to work as a team to be effective. If you remember back to the *Secret Blend of Effective Leadership*, "partnership harvests the potential of the team." Further, "the key to effective leadership is the relationship you build with your team." It is obvious that this group will experience success and also failures, therefore it is important to remember to stick together and communicate.

When should we hold our cabinet meetings?

What responsibilities do you have to your cabinet?

Living the Ritual

- ☆ The Ritual is our Fraternity's greatest inheritance and therefore should be taken with strong consideration and high regard. Discuss the importance of our Ritual how we can use to guide us as leaders. Take time to also discuss how the chapter can apply its value to each chapter operation.

What is risk management and why is it important?"

- ☆ Reference Phi Gamma Delta's Risk Management Policy that is included in your Officer Notebook.
- ☆ Discuss any other university/college polices that must be followed.

How important is it to stand behind decisions made by the group?

How can you improve your relationship with this group?

What role does communication play when serving on cabinet?

What responsibilities does the cabinet have to the graduates?

What responsibilities does the cabinet have to the committee chairman?

How about individual brothers?

FACILITATOR 9

Delegation

Focus

To demonstrate how to increase the level of accountability within the chapter through effective delegation.

Total Time (including discussion)

30-40 minutes

Benefits

- 1) Helps demonstrate how to motivate others to invest their time.
- 2) Identifies common problems in delegation.

Tips

- 1) Go around the room taking turns reading different parts of this section.
- 2) It is important that the brothers do not conceive this as a "hands off" approach or an approach that releases them from responsibility.
- 3) Have the officers create short lists of tasks or projects that should and should not be delegated.
- 4) Do some role playing with one officer being the delegator and the other being the "delegatee". Work through a couple scenarios involving different personalities.
- 5) This concept will need more follow up in the future as it is easier to discuss than actually execute.

Facilitator Questions

What are some challenges that you might face when delegating a task?

What is an effective approach to delegation?

Who should be delegating tasks?

What do you do when tasks that have been delegated are not being completed?



Delegating Authority

Delegation – How to empower others

Leaders are different than managers and others because of vision and direction. Leaders are responsible for the ultimate goal of the group, constructing a unified direction based on the many different needs of the group's members. Having constructed this goal and direction, leaders then put the group into action, ensure it remains cohesive, that the members are having fun, and that the aims of the group are met.

Delegation is your weapon to move the brothers into action; how well you do it will indicate how effective you are as a leader. Some leaders have a natural tendency to do too much individually; as a result, much of the potential within the chapter goes unused. Further, the leaders had "tunnel vision" on routine tasks and did not work to maximize the energy within the chapter. There are others who actually delegate too much and do not put enough on their own shoulders, hence nothing really gets done. What you are looking for as an effective leader, is a balance between the two.

Three primary stages of effective delegation

- 1) Deciding what task(s) should be delegated
- 2) Delegating that task
- 3) Follow up.

Deciding what task(s) to delegate

When deciding what you should or should not delegate, keep in mind your role within the chapter. You are a leader; you are responsible for the movement of the chapter. Therefore, it is your responsibility to mobilize the brothers, and to put them into action. Thus, you need to let others contribute and "take ownership" so that they too will have a stake in the success of the organization.

It is also very important to remember the axiom of delegation:

You are delegating authority, not responsibility.

Though you have given another brother the authority to execute a project, it is still your responsibility to ensure that it is completed

Delegating the task (continued)

Delegate authority based on desire and capabilities. With younger members, you must go easy; to not give more than they can do or of which they are capable. Hopefully, this will prevent the brother from becoming frustrated and losing interest.

When selecting the brother, ask:

- 1) Does he have the time? (HONESTLY?) If not, can some of his tasks be delegated to others in order to make time?
- 2) Can he be interested in the job? Is there opportunity for creative contribution?
- 3) Is he sufficiently qualified?
- 4) Will productivity be improved?
- 5) How will others react? What can you do to mitigate potential unfavorable reactions?

When you delegate authority

- 1) Explain why he was selected to lead.
 - Examples: "Your ideas in this area are very good."
 - "As a leader in this chapter, I feel you are the best to get this job done."
 - "I have confidence in you. I believe you can take this job and make it go!"
- 2) Explain his responsibility.
 - Examples: "Here is your authority."
 - "Select your own committee members."
 - "Define your own plan of action."
- 3) Explain what is expected of him and his task group.
 - Examples: Report to the cabinet or particular officer.
 - Develop a program for future consideration.
 - Implement a program effectively and immediately.
- 4) Discuss the task.
 - Examples: What are his ideas?
 - What are your ideas?
 - What are the goals and objectives?
- 5) Offer yourself as a resource.
 - Examples: "How can I help you accomplish your goals/task?" (Servant Leadership)
 - "Is there a resource I can help you find?"
- 6) Supply other resources -- people, materials, examples, etc.
- 7) Set mutual target dates for getting the task completed.
- 8) Express your confidence and support of him and of the group.



FOLLOWING UP

One of the most common mistakes in delegation is thinking that once you have properly received a commitment from someone, the job of delegation is over. However, it is extremely important that you continue to follow up with the brother, to ensure that the project is being accomplished and done well.

You've heard the saying "if you want it done right, do it yourself." Though this may seem to ring with a great deal of validity, you also need to realize that just because you are not actually doing the project yourself does not mean it cannot be done well or the "right way."

THIS IS THE IMPORTANCE OF FOLLOW UP

Be sure you are involved in the process to some extent, NOT to show a lack of confidence in the brother doing the project, but to ensure that both of you are content after the work is done. If you are a leader that tends to believe in the "do-it-yourself" philosophy, you will need to work at allowing other's ideas and work be a part of the end product. *Otherwise, you may never be satisfied, try to do too much, and not be the effective delegator and leader that you could be.*

Lunch

Finally, right? Well, today you will be taking a working lunch with your fellow chapter brothers, the outgoing officers. During this time you should focus on drawing as much wisdom from your predecessor as possible.

The memos

Use the memos that you prepared prior the retreat to help guide the discussion.

Outgoing officers should be able answer the questions:

- ☆ What problems or stumbling blocks did you encounter as an officer?
- ☆ How were these problems or stumbling blocks dealt with?
- ☆ What aspects of your term went well?
- ☆ What recommendations to you have for the incoming officer?
- ☆ What unfinished business must be addressed?

4) Incoming officers should be able answer the questions

- ☆ What is the purpose of my position?
- ☆ What are my responsibilities?
- ☆ How can I improve what the former officer accomplished?
- ☆ What new/old programs do I plan to utilize during my term?
- ☆ What do I want to accomplish in the short term (3 goals)?
- ☆ What are two or three action items I must accomplish to complete these short term goals? What is the projected date of completion for those goals?
- ☆ What do I want to accomplish in the long term (3 goals)?
- ☆ What are two or three action items I must accomplish to complete these long term goals? What is the projected date of completion for these goals?



The Plan – Strategic Planning

Focus

To evaluate the current condition of the chapter, review the committees and to create a strategic vision for the future (essentially a game plan).

Total Time (including discussion)

1 hour and 30 minutes

Benefits

- 1) Results in the first critical step for the chapter's advancement.
- 2) Allows each officer to express his opinion.
- 3) Encourages a comprehensive coverage of chapter operations.
- 4) Provides a written strategic analysis that will be used to align chapter operations with the chapter's mission statement, which was created in the "The Mission" exercise.
- 5) Encourages the officers to prioritize goals and assign responsibilities.

What is Strategic Planning?

The concept of strategic planning can sometimes be unwieldy and intellectually challenging to students. Be enthusiastic when covering this material. Spend time discussing this information and how it relates to the Fraternity. It is essential that the officers understand why they are doing this. Reference the section *Why do we exist?* often during your discussions.

Tips

- 1) This section is fairly self-explanatory, but it would be beneficial to familiarize yourself with it completely before facilitating.
- 2) You may need to help the brothers specify and clarify areas they list. Sometimes they will list many non-tangibles such as motivation, brotherhood, apathy, etc., that, though they may be valid, need to be broken down to more tangible areas.
- 3) Make sure to contribute some ideas of your own, regarding areas of focus for the officers and chapter. But remember, the ultimate decision is theirs!
- 4) Task the Recording Secretary with keeping more formal notes of the written strategic plan.

Facilitator Questions

Does each officer understand the importance of strategic planning?

Are we taking our mission statement into consideration when executing our chapter analysis?

Have we considered each strength and weakness adequately?

The Plan – Creating a Strategic Vision for the Future



Establishing the condition of the chapter
SWOT Analysis

The strategic plan continues: from strong to weak

Setting the right goals – SMART Goals

Review of committees

The Plan – Strategic goals and objectives





The Plan – Creating a Strategic Vision for the Future

The development of a solid plan of attack is essential for successful growth. Many chapters in Phi Gamma Delta make constructive plans to determine where their chapter presently stands. Their plans then serve as tools to move their chapters forward.

There has NEVER been an officer or a chapter that has planned too much. There has, on the other hand, certainly been instances of failure to plan. Continued success will demand continued assessment of our status and setting in motion programs designed to build EXCELLENCE.

Remember why we exist?

Refer back to the exercise *The Mission* where you created a mission statement for your chapter. Rewrite that statement below:

In addition to The Mission of Phi Gamma Delta and your chapter’s mission statement, you should also keep these questions in mind: (write down your responses)

Where do you want this chapter to be by the end of this semester? What do you hope to have accomplished?

Where do you want this chapter to be by the end next semester? What size will the chapter be? How will it perform academically?

Where do you envision your chapter in five years? What do you hope to have accomplished as a brotherhood?

Establishing the Condition of the Chapter – SWOT Analysis

The most effective way to identify the current status of the chapter is to conduct a SWOT Analysis. SWOT stands for Strengths, Weaknesses, Opportunities, and Threats. This technique (or other variations) is used by major corporations, boards of trustees, and many other organizations worldwide.

THE PROCESS

Brainstorming -- As you saw in the *Why Phi Gamma Delta Exists* exercise, the meaning of "fraternity" is different for each officer. Your view of the chapter's problems might be different from other members. Brainstorming can give us a broad base of concerns and strong points with which to work. There are no "right" or "wrong" suggestions when brainstorming and its evaluation must remain dichotomous.

Strengths

What does the chapter excel at?
 What advantages do we have?
 What does the chapter do well?
 What resources does the chapter take advantage of?
 What do other people see as your strengths?

Weaknesses

What does the chapter struggle with?
 What could you improve?
 What does the chapter do poorly?
 What should you avoid?

Opportunities

What relevant resources do you have access to?
 What items should the chapter take advantage of and doesn't?
 Where are the good opportunities facing you?
 What are the interesting trends you are aware of?

Useful opportunities can come from such things as:

- ☆ Changes in administrative policy related to your chapter
- ☆ Changes in social patterns, population profiles, lifestyle changes, etc.
- ☆ Local Events

Threats

What items should the chapter keep a careful eye on?
 How can the chapter prepare for certain externalities?
 What obstacles do you face?
 What is your competition doing?
 Are the required specifications for your chapter changing?
 Do you have bad debt or cash-flow problems?
 Could any of your weaknesses seriously threaten your chapter?



SWOT ANALYSIS

Using brainstorming, complete an analysis of our chapter. (45 minutes)

Use a flip chart or white board to list out the specific points under each heading. As newly elected officers you should be able to assemble a lengthy list for each category.

Present Strengths

- | | |
|----|----|
| 1. | 5. |
| 2. | 6. |
| 3. | 7. |
| 4. | 8. |

Present Weaknesses

- | | |
|----|----|
| 1. | 5. |
| 2. | 6. |
| 3. | 7. |
| 4. | 8. |

Available Opportunities (stress both helping and hindering)

- | | |
|----|----|
| 1. | 5. |
| 2. | 6. |
| 3. | 7. |
| 4. | 8. |

Threats (to the chapter and individual members)

- | | |
|----|----|
| 1. | 5. |
| 2. | 6. |
| 3. | 7. |
| 4. | 8. |

PRIORITIZE YOUR STRENGTHS AND WEAKNESSES AS YOU HAVE LISTED THEM ABOVE

Strengths

- 1.
- 2.
- 3.
- 4.
- 5.

Weaknesses

- 1.
- 2.
- 3.
- 4.
- 5.

THE STRATEGIC PLAN CONTINUES - FROM WEAK TO STRONG

Now that you have determined some of the stronger and weaker areas of operation at our chapter, the *important* and *difficult* work begins. It is easy to critique the present status of the chapter. Doing something constructive with the results is a true challenge for your leadership. You cannot expect to lead the chapter out of a troubled area unless you have a strategic game plan. Similarly, you need a game plan for maintaining strong areas and improving weak areas. Once you have developed a well supported game plan, you can lead the chapter to success.

Setting the Right Goals – SMART GOALS

Goal setting is not an easy task. Throughout the goal setting process you must keep in mind that a goal is a desired outcome. Clear goals have five basic characteristics. If they meet these five criteria, then they are **SMART** goals; otherwise they are simply statements without action.

SPECIFIC and MEASURABLE

- ☆ Where am I going and how will I know when I get there?
- ☆ Qualifies and quantifies so there is no misunderstanding.
- ☆ Goal: "To improve our campus reputation." Vs. "Every brother and pledge will be involved in at least one student organization."

MOTIVATING

- ☆ Is the goal emotionally compelling?
- ☆ If you create this goal, will you follow through with it?
- ☆ Goal: "Have meeting minutes done by the end of each week." Vs. "I will have meeting minutes completed and e-mailed to all brothers within four hours of the end of our chapter meeting."

ATTAINABLE

- ☆ Can you reach your goal or are you setting yourself up for failure?
- ☆ Are your goals realistic? Are you aiming too low or is it a challenge?
- ☆ Goals that do not challenge become meaningless.

RELEVANT

- ☆ Does the goal relate to a specific responsibility?
- ☆ Are you aiming for the group's objective or your own objectives?
- ☆ Trivial goals are worse than no goals because they direct your energy away from what is really important.

TRACKABLE and TIME BOUND

- ☆ Is there a start and end date?
- ☆ Is the goal divided into segments so that you can evaluate progress?

An example of a SMART goal containing all components is: "Our pledge class will complete at least one community service project necessary for us to be eligible for membership in the Fraternity by the end of the semester."



Overcoming a Weakness – Strategic Action Planning

Form an Action Plan – Where do we want to go and how do we get there?

The following exercise is designed to take an in-depth review of a present chapter weakness, and develop a game plan to move you forward. Each officer should take one of the areas listed under the prioritized weaknesses (preferably an area that he intends to oversee) and lead the other officers through the strategic game plan. (10-15 minutes)

WEAK AREA GAME PLAN

At the present time, a weak area of the chapter is _____.

Present Status – SWOT Analysis

Strengths

- 1.
- 2.
- 3.

Weaknesses

- 1.
- 2.
- 3.

Opportunities

- 1.
- 2.
- 3.

Threats

- 1.
- 2.
- 3.

Primary Semester Goals

- A.
- B.
- C.

Prioritize Objectives – Action Plan

- a.
- b.
- c.

(Each goal should coordinate with an objective: A-a, B-b, C-c)

Evaluating Your Success

Did you meet your objective(s)?

What objectives were not met?

Any suggestions for change?

FACILITATOR 11

Review of Committees

Focus

Generating a big picture perspective for every area of chapter operation.

Total Time (including discussion)

25-30 minutes

Benefits

- 1) Describes, in detail, the responsibilities of each committee chairman.
- 2) Gives the officers direction.

Tips

- 1) Now that you have identified the five top priorities of the chapter and created plans of action for those priorities, we recommend that you go over each committee and review the expectations for that committee, the chairman, which officers are in charge of which committees, what the calendar looks like, etc.

This section is primarily a "do-it-yourself" type arrangement. Feel free take any approach you see fit.

Facilitator Questions

Is the officer the best person for overseeing each committee?

*Refer to the section *Review of Committees* in the participant workbook (next page) for more prompt questions.



Review of Committees

Committee members are the empowered brothers that will be enacting the vision; therefore, each chairman and member deserves much attention, guidance and consideration.

We have already identified five top priorities of the chapter and created plans of action for those priorities. It is now time to examine the big picture perspective of chapter operations. In this section we will review each committee function, expectations for that committee, the chairman, which officers are in charge of which committees, what the calendar looks like, etc.

Committee Structure

The committee structure is a vital component to the infrastructure of our organization, both for Phi Gamma Delta and your chapter. Below you will find the suggested committees for each officer.

Is this the most effective committee system for your chapter? If not, then reassign the committee to the officer that is best fit for the job.

PRESIDENT – CEO

Suggested Committees: All other cabinet officers

Treasurer - FINANCE

Suggested Committees: Finance, Social, House Manager, Fundraising

Recording Secretary - INTERNAL COMMUNICATIONS

Suggested Committees: Recruitment, Scholarship, Risk Management, Judicial Board

Corresponding Secretary - EXTERNAL COMMUNICATION

Suggested Committees: IFC, Communications, Publications, Graduate Relations

Historian - RITUALIST

Suggested Committees: Pledge Education, Brotherhood, Intramurals, Special Events

My officer position is _____.

I am responsible for overseeing these committees:

Review of Committees (continued)

It's time to review each committee. Here is a list of the suggested committees:

Finance	Risk Management	Pledge Education
Social	Judicial Board	Brotherhood
House Manager	IFC	Intramurals
Fundraising	Communications	Special Events
Recruitment	Publications/Newsletter	Webmaster
Scholarship	Graduate Relations	

Refer to your Officer Notebook for the job descriptions of each committee and committee chairman.

Your goal should be to take this chapter from *good to Great*. We have the *vehicle* (action plans) to take us there, now we just need to get the right people *on the bus*.

And, inevitably, be thoughtful of how each committee's priorities and objectives are aligned with the ultimate strategic plan and mission of your chapter.

Questions that each of you should be asking yourself during your discussions:

Which officer will oversee this committee?

What are the expectations of the committee?

What are the priorities and objectives for each chapter?

Is the current chairman capable of his duties?

Is there another brother that is a better fit for this position?

What are dates that should be on this committee's calendar?

*Write these down so that we can add them to the master calendar later.

*Take notes on your committees' priorities and objectives on the next page.



Committee: _____

Priorities:

Objectives:

Committee: _____

Priorities:

Objectives:

Committee: _____

Priorities:

Objectives:

Committee: _____

Priorities:

Objectives:



FACILITATOR 10

The Plan – Strategic Goals and Objectives

Focus

To formally identify and prioritize objectives and goals for the both this cabinet and chapter for the upcoming year.

Total Time (including time)

30-40 minutes

Benefits

- 1) Builds a final group consensus.
- 2) Provides a time to evaluate the goals that have already been established throughout the retreat.

Tips

- 1) Open a general dialogue regarding the goals and action plans. Build cabinet consensus on the quality and merit of the planning in each objective. The goal of this portion of the retreat is to get each officer to buy into what it (the cabinet) just created. You must lead the group towards seeing what they put together and imagining how great their chapter would be if they accomplished all that they set out in each objective. This is the facilitator's time to shine and be the cheerleader for the cabinet.
- 2) Remind the officers about the mission statement it created at the beginning of the retreat. Pose questions about each objective/goal and whether it will benefit the chapter.
- 3) Task the Recording Secretary with keeping more formal notes on the goals and prioritized objectives that are created, so that he can type them up later.

Facilitator Questions

How our goals aligned with the mission statement?

Is there a consistency in our goals and objectives?

Have we addressed all of our chapter's weaknesses adequately?



Goals and Objectives: Short and Long Term

This section should be used to compile all the short term and long term goals that have been mentioned throughout the day and to add any new ideas that have not been mentioned yet. Remember that your goals should be **SMART** goals.

Short term Cabinet Goals and Objectives

Long Term Chapter/Cabinet Goals and Objectives

Mapping out success

Brothers, now that you've set goals and created actions plans, it's time to create a master calendar for the chapter. This calendar will be extremely important for setting future programming and event dates.

In your Officer Notebook you will find empty calendar sheets to reference and pencil in dates to remember.

Task one brother to create the master calendar.

Remember to include these dates:

Date of Chapter/Recruitment Retreat
Recruitment Dates/Events
Dates of Pledge Events
Philanthropy Events
Formal Chapter Meetings
Greek Week

Campus events
Initiation
IFC Meetings
Major Academic Dates
Brotherhood Events



Implementing Your Strategic Game Plan

The most crucial part of the strategic planning process is implementing the action plans that were agreed upon during the retreat. If you, as leaders, do not act on the goals that you have established, then having the retreat was a waste.

FOUR COMMITMENTS BY YOU

- ☆ We are committed to **STRONG** and **EFFECTIVE** leadership. We understand that we are leaders of brothers who will benefit from a highly positive and substantive fraternity experience.
- ☆ We are committed to **SETTING OUR BROTHERS INTO ACTION**. It is through participation that we maximize the fraternity experience for everyone and achieve the goals and aims of the chapter.
- ☆ We are committed to holding ourselves and others **ACCOUNTABLE** for the goals, aspirations, and actions of our chapter.
- ☆ We are committed to the ideas that the Fraternity is to be fun, foster life-long friendships, and better the lives of every brother.

“Nothing in the world can take the place of persistence. Talent will not; nothing is more common than unsuccessful men with talent. Genius will not; unrewarded genius is almost a proverb. Education will not; the world is full of educated derelicts. Persistence and determination alone are omnipotent. The slogan ‘Press On’ has solved and always will solve the problems of the human race.”

-Calvin Coolidge





Remainder of Agenda

Essentially the rest of the agenda is closure and self-explanatory. The key here is to end the day with a clear vision in mind, assignments in place, and a working calendar in hand.

The officers should be prepared to discuss the plans of action with the committee chairmen and the chapter. They should understand what follow-up is required of them and the role you (or other Graduates) will be playing in the future related to the material developed during this retreat.

Leave some time to discuss any Fraternity Information and/or important dates coming up. In addition, be sure to discuss the importance of the retreat, what was effective during the retreat, what should have been different, etc.

Finally, it is important the each officer realizes that this retreat is only the first step toward success and positive change. Remind the group about the “big picture” and that the chapter should use the Five Step Retreat planner (in Appendix) to plan their own chapter retreat.

Note: Remind the officers about the other valuable resources located in the Appendix.



APPENDIX

IHQ Staff Information

Settling Conflict

Tips on Keeping Control

Tips on Chapter Meetings

Motivation

Tips on Involvement

Members' Interest Survey

The Five Step Retreat Planner



IHQ Staff

[Follow this link for all IHQ staff members.](#)

THE REVOLT OF THE MASSES

Wouldn't it be nice if the officers developed a plan of attack to improve our chapter and the ENTIRE chapter supported the plan? Ha! You would be naive to think that all the chapter membership is going to support your program.

Different members of the chapter have different needs. Different needs of individuals result in different aspects of the fraternity being important. The chapter that has complete harmony is quite unique and quite dull.

It is up to the officers to help unify these differing factions of the chapter. The Chapter President is usually caught in the middle of these factions and must resolve these or any conflicts. Because conflict is natural, some conflict might be viewed as "healthy." Our chapter can be enhanced by exploring new ideas and experiences. Your challenge as a new chapter officer is to keep these challenges at a healthy level.

There are a number of approaches to deal with conflict which develops within the chapter. The Chapter President must determine what the best approach is to solving the conflicts which exist between chapter goals, chapter member needs, and individual personalities. The Treasurer, Recording Secretary, Corresponding Secretary and Historian should help define and loyally support the administration of which they are a part, while maintaining their individual selves. Together, unified officers (FIVE members strong) can be virtually unstoppable! Listed below are common approaches in dealing with organizational conflict.

Suppression or Smoothing Over -- The leader plays down the difference that might exist in order to keep the "ship floating smoothly."

Power of Dominance -- Using the authority of your position to make the final decision; voting and the majority rules are other examples.

Compromise/negotiation -- The process of give and take is often practiced at Phi Gamma Delta chapters. Both sides sometimes feel they have won the conflict; however, the compromise can be watered down to the point where the final solutions become ineffective.

Integration or Collaboration -- The emphasis is placed on the problem, rather than on defending one's certain position to the bitter end. The best of the group's thinking will ultimately emerge.

SETTLE THE CONFLICT

What style of dealing with conflict do you use when dealing with conflict?

PERSONAL

Style Used & Why:

OFFICERS' RESULT

Style Used & Why:



TIPS FOR KEEPING CONTROL

One of the difficult challenges of being an officer is keeping control of your many different areas of responsibility. During your term as an officer, you will find that there is always something that needs attention. One side are your responsibilities as an officer, another side is you as a student (a successful student), your family, and, of course, your social life. The key to being successful in all areas is being able to prioritize and budget your time.

TIPS:

- 1) Your control starts when you sit down and plan. Brainstorm and determine just what needs to be accomplished in all your areas of responsibility. Planning simply brings the future to the present.
- 2) Make a list of projects that must be completed for both the classroom and your Chapter Office. Be certain you prioritize the list. Concentrate on essential projects.
- 3) Try to organize your day. Take ten minutes each and every evening or early morning to plan what needs to be accomplished.
- 4) If you don't keep a calendar, start with the one in your Notebook! If you hope to recall everything from memory, you will find yourself missing class assignments, important dates, meetings, etc.
- 5) Try to block out time to work on specific jobs/projects. Find out when you do your best work and plan accordingly. Try to group errands to save time and energy.
- 6) Keep loose. You must remain as flexible as possible to keep on top of all your many responsibilities.



TIPS ON MEETINGS

Meetings can be BORING! Consider the Following:

1. BEFORE THE MEETING:

- a) Review the agenda.
- b) Be sure all needed materials are ready.
- c) Be sure the chapter room is arranged properly AND needed equipment is on hand and working.
- d) Be sure ALL the chapter room is arranged properly AND needed equipment is on hand and working.
- e) Be sure ALL the officers are ready; if one is absent, not only does it reflect poorly on him, but on the whole cabinet, and consequently, on the entire Chapter.

2. DURING THE MEETING:

- a) Call it to order at the announced time!
- b) Lead the group to establish priorities in the agenda and to agree on the time spent on each item.
- c) Keep the group on the subject.
- d) Keep the group on its time commitments for each agenda item.
- e) For all but the most routine motions, use a chalkboard or large chart to write motions for proposals so all can see. (Use Recording Secretary effectively)
- f) Check to make sure everyone has a chance to contribute to the discussion.
- g) Conduct, or ask someone to conduct, a debriefing session during the last ten minutes of the meeting.

CONSIDER:

- a) Did we accomplish our goals for the meeting?
- b) Did we use our resources effectively?
- c) Did we avoid pitfalls such as wasting time or trying to solve unsolvable problems?

3. Close the meeting at the announced time.

4. AFTER THE MEETING

- a) Check with the Recording Secretary; Correspondence Secretary:
- b) Clarify minutes.
- c) Arrangements for distribution of minutes, and any correspondence needed.
- d) Start building the agenda for the next Chapter Meeting.
- e) Items not dealt with
- f) Tabled items
- g) "Investigate and report-back" issues
- h) Follow-up on actions taken



CRITERIA FOR A SUCCESSFUL CHAPTER MEETING

- 1) Meetings should follow businesslike procedures.
- 2) Meetings should be cooperatively planned with the members, officers, the cabinet, and Purple Legionnaire.
- 3) Everyone should be able to be heard and have their views respected (even when disagreed with).
- 4) The President should be firm, consistent, and fair to all.



TIPS FOR INVOLVEMENT

There are some tips for improving the involvement from each member. You as an officer should strive to get maximum involvement from each member. Maximum involvement does not mean 100% support for every project by every member involved in some phase of chapter operation and programming.

TIPS TO IMPROVE MEMBER INVOLVEMENT

- 1) The attractiveness of the project is very important. It must kindle some interest from the membership to be successful in gaining support.
- 2) Have you determined what interest the membership of the chapter? The best way to find out what excites people is to do a membership interest survey.
- 3) Get the membership involved in the decision making process. People are reluctant to support projects that they have had little or no input in creating. You can count on a percentage of the chapter to get involved in whatever the project is. you can count on a percentage of the chapter never to get involved regardless of the project. The key is to get the group in the middle involved.
- 4) Leaders need to be enthusiastic to get projects off the drawing boards and into operation. You, as an officer, need to be positive and promote the project every chance you get.
- 5) Encourage involvement: often members of the chapter fail to get involved because no one ever asks them to jump at a chapter meeting to volunteer for project.
- 6) Check up smartly: people do not like to be talked down to by other members in the chapter. If given the choice, ask questions about a project instead of just putting the "hammer" to a Committee Chairman that might be dragging his feet. Offer to help him with his Committee Report.
- 7) Reinforce a job well done: Chapter members enjoy the positive reinforcement of knowing you appreciate the job they have been doing. People that have a good experience with one project will come back for more exposure.
- 8) Communication/Promotion (P.R.) is essential for the successful involvement of the membership. Chapter Officer and Committee Reports, bulletin board reminders, posters, etc. are all avenues for increased member involvement.



MOTIVATION

One problem which faces chapters is non-participation. Non-participation, or apathy, is one of the primary forces that lead to a lack of fraternity understanding, definition of purpose, setting chapter goals, and the beginning of chapter decline.

No individual brother of the chapter will ever take claim that he is "Apathetic." Apathy, however, may take the form of lack of enthusiasm for the office, lack of persistence, or satisfaction with poor work. There are some common reasons for apathy that good chapter officers are looking for:

- ☆ The problem upon which the fraternity is working does not seem important...or it is less important than some other problem on which they would prefer to be working.
- ☆ The group may not have adequate procedures for solving the problem.
- ☆ Members may feel powerless about influencing the final decision.
- ☆ Conflict exists between members of the fraternity.
- ☆ Fear of failing to meet the goal set for the group.



INSTRUCTIONS FOR USING MEMBER'S INTEREST SURVEY

- 1) Survey each member. You may wish to add categories better suited for chapter timing.
- 2) The survey may be conducted in a planning session or may be initially completed privately by each member. It can then be used for discussion and determining priorities when the group is together.
- 3) Tally the members' top 3 priorities by a show of hands. Indicate the top ones.
- 4) Take your calendar (already exhibited on the bulletin board) and have members in small groups discuss as to whether these activities will meet the major interests they just determined. You may wish to only discuss one semester's activities.
- 5) If these activities aren't compatible with member interests, then how can they be improved upon, or should some be eliminated? Get group suggestions on this.
- 6) Set up committees or action groups to work out the best plans for the selected activities. Everyone should be on a committee or action group. Personal selection is the best means of grouping people.

FIND OUT WHAT YOUR MEMBERS REALLY WANT TO BE INVOLVED IN

The best means of knowing all members' interests and needs is to take a survey. The survey can easily be done at meetings or special times. Times and people continually change ... so to do the chapter's needs and interests.

Chapter goals and activities must reflect the needs and current interests of ALL the chapter's members...not just the officers...or those few brothers who seem to do all the work.

REMEMBER: Some activities can (and should) be planned for only half the chapter -- while the other half will plan something for later. It is better to get total involvement from members in two activities, than very little in one big project!



PHI GAMMA DELTA -- MEMBERS' INTEREST SURVEY

I. What I personally want to gain from my fraternity membership? (rank-order in preference, with #1 being first, #2 being second, so forth on down)

- _____ a. Friendship and close friends
- _____ b. Parties and broader social contacts
- _____ c. Social poise and the ability to talk easily with others
- _____ d. Greater involvement in my chapter
- _____ e. Development of leadership qualities and organizational ability
- _____ f. Greater confidence and pride in myself
- _____ g. Scholastic achievement or assistance
- _____ h. Involvement in service and philanthropic projects -- campus and community
- _____ i. Intellectual and cultural enrichment -- Chapter and campus
- _____ j. Experience in working with others
- _____ k. Individual character development and philosophy of life
- _____ l. Greater involvement on campus
- _____ m. Other
- _____ n. Other

II. Specific Activities I would suggest to help me develop my needs and interests through my chapter (and when these activities should be scheduled):

- | | | |
|----|----|----|
| a. | c. | e. |
| b. | d. | f. |
-

III. Specific Activities I would suggest to help my Chapter gain more unity and total member involvement (and when these activities should be scheduled):

- | | | |
|----|----|----|
| a. | c. | e. |
| b. | d. | f. |
-

CONCLUSIONS AND MAJOR AREAS OF INTEREST REACHED IN CHAPTER DISCUSSION FOLLOWING THE SURVEY:

- | | | |
|----|----|----|
| 1. | 2. | 3. |
|----|----|----|

The Five Step Retreat Planner

Your guide to planning any retreat

Step 1: Define the purpose of the retreat

- *Why define the retreat*
 - Without a road map, you do not know where you are going. Likewise, if your chapter is meeting without a purpose then the retreat will not be productive. Not only will identifying a specific reason for meeting enable the group to stay focused on why it is meeting, it will also allow the planners of the retreat effectively plan the sessions of the retreat.
 - Examples:
 - General chapter retreat – comprehensive chapter planning
 - Scholarship – establish scholastic standards
 - Recruitment – goal setting and method of taking pledges
 - Cabinet – create united group to lead chapter
- *Goals and objectives*
 - Once the purpose of the retreat has been defined then the planners need to establish some realistic expectations of the retreat. Knowing what the chapter expects to gain from the retreat will allow those involved to know what they are expected to produce. Determine how long the chapter will work on its goals before reviewing them and establishing new ones.
- *Determine attendance*
 - The purpose of the retreat will determine who needs to attend the retreat. Clearly, not all brothers need to attend the cabinet retreat, but the attendance of the entire brotherhood may not be necessary for other purposes. For example, the recruitment committee may want to meet by itself to discuss how it will create an effective recruitment effort for the chapter. The results of that retreat could be presented to the brotherhood at a chapter meeting or be discussed at a general chapter retreat.

Step 2: Identify resources you'll need

- *Location, location, location*
 - Setting the right environment for your chapter's retreat is what you need to get the most out of your time together. It would be most beneficial to get away from the chapter house and campus. Going to an unfamiliar place is a nice change of scenery that will encourage the brothers to be creative thinkers. Remember, you want this time to be productive *and* fun, so be sure to pick a place where distractions will be at a minimum.
 - Examples:
 - Cabin at state park
 - Graduate brother's house
 - IHQ conference room
- *Gather materials required*
 - Retreats take a lot out of those involved. So you'll want to keep your brothers happy as they spend their time brainstorming and debating ideas for the



benefit of the chapter. Snacks, soda, and water are necessities for retreats. But also remember that the brotherhood will need pens, paper, markers, flip charts and binders to keep their thoughts organized. Refer to the checklist page at the end to make sure you have thought of everything, including resources for agenda planning.

- *Invite outside facilitators*
 - Outside sources of input are great resources to your chapter. Their presence would offer a refreshing outlook on a chapter issue. It is *highly* recommended that your chapter's Purple Legionnaire or other key graduate play an essential role in planning and executing the retreat. Be it a graduate brother, university official, or IHQ representative that you would like to play a role in the retreat it is important that you ask early. This way, the potential facilitator can put your retreat in his schedule.

Step 3: Setting the agenda

- *Time effectiveness*
 - Would you want to spend two hours discussing the proper way to fill out a pledge form? Probably not, and your brothers would not want to either. So when you are building the agenda for the retreat it is good to keep in mind the nature of the topic being discussed. Remember to break too! For any and all issues you will want to allow the proper amount of time to:
 - Introduction
 - Brainstorm/discussion
 - Wrap UpDo not come up short either! Allow five minutes longer than you think you will need.
- *Facilitator needs*
 - Your facilitator may not be able to attend the retreat for the entire time. If that is the case then be mindful of their needs in planning the topics of different sessions.

In addition, it might be useful if the brothers in attendance have had time to discuss the advanced topics that will be covered before the retreat starts.
- *Build on small goals*
 - It is no fun when the group feels that it is not making any progress on an issue. Each session should end with a step forward. Break up the time so that each session builds up to the general topic that is in relation to purpose of the retreat.
 - Example – Recruitment retreat
 - Session 1: What exactly is recruitment
 - Session 2: Who do we want
 - Session 3: How are we going to get our men
 - Session 4: Complete recruitment goalsThis same approach will also work if the retreat is focused on comprehensive chapter goal setting. Just make sure that each session, in some way, leads up to the establishment of a substantive chapter goal.
 - Example – Complete chapter retreat
 - Session 1: Recruit 365

- Session 2: Philanthropy and the Chapter
- Session 3: Building Brotherhood
- Session 4: Chapter Goals

Step 4: In the action

- *Stay on time*
 - Part of the novelty of a retreat is having fun with your brothers, just not too much fun. As a retreat leader you will need to make sure that the brothers do not get too far off topic. Though it is fun to talk about what happened at last year's spring brotherhood retreat, no progress will be made if the brothers just reminisce. Experienced facilitators (i.e. graduate brother, university staff) can help brothers facilitating for the first time keep discussion on task and generate effective discussion.
- *Be flexible*
 - Though you will spend a great deal of time planning the retreat down to the smallest detail, there may be something that comes up that requires a change in direction. Through the course of discussion an idea or topic could arise that may be a better way to tackle an issue and require a change of plans. Listen to your brothers and make the necessary changes so the chapter can benefit from the new contribution.
- *Set goals*
 - Leaving a retreat without specific expectations would make the time spent together meaningless. Follow the model below to make sure that SMART goals are set:
 - Specific and measurable – describe in detail exactly what you want to accomplish in definite terms
 - Ex: *We want 20 pledges.*
 - Motivating – the goal should be emotionally compelling for the brotherhood; should be pertinent to the chapter's mission
 - Ex: *We want 20 pledges to grow the membership of the chapter.*
 - Attainable – do what is within your power to accomplish; the example below shows that you can make a case for the award, but know that someone else actually gives the award
 - Ex: *We want 20 pledges to grow the membership of the chapter, so that we can make a case for chapter of the year.*
 - Relevant – be sure that the goal has meaning and is relevant to the chapter's overall plan
 - Ex: *We want 20 pledges to grow the membership of the chapter, so that we can make a case for chapter of the year.*
 - Trackable and timebound – set trackable segments to check progress
 - Ex: *We want 20 pledges by next semester to grow the membership of the chapter so that we can make a case for chapter of the year*



- Establishing a SMART goal will allow the chapter to know exactly what it wants to do, why it should do it, know it can do it, see that the goal is important, and when the goal should be accomplished. This will greatly increase the effectiveness of the retreat.

Step 5: Follow up

- *Visible reminders*
 - Now that the chapter has established the expectations for the upcoming semester/year, put them up so everyone can remember to what they committed. The worst thing to come from a retreat is a number of fuzzy memories about what was discussed. By posting the goals in a conspicuous place the brothers will have a constant reminder of what they should be working toward. Use hallways, the dining room, chapter room, or anywhere else you think the goals should be seen.
- *Chapter accountability*
 - After the chapter has agreed to the goals it wants to accomplish, it is up to the brotherhood to hold everyone to the promises each it has made. Though the cabinet should play a large role in accountability, it is up to every individual brother to remind each other about the commitments of the chapter. It would be a good idea for the cabinet or brotherhood to honor the brothers who go out of their way to work toward a chapter goal. When brothers are doing a great job, praise them!
- *Revise the goals*
 - Goals, like food, go bad after a while. After a predetermined period of time, the cabinet should review the goals that the chapter has set. Has the goal already been met? If so, then try to improve on the chapter's current condition. For example, you wanted to have 20 pledges by next semester and you have 22. Great, now try to get 25! However, if you see that the chapter is coming up short on a goal then revise the methods being used to accomplish that goal. Maybe a one brother is doing too much work, or a deadline that was set is not realistic. Provide assistance by recruiting other brothers to help or by extending the deadline of the goal. When you are planning for the next retreat it is important to remember:
 - What worked? – keep doing it
 - What did not work? – stop immediately!
 - What went well last retreat?
 - What did not go well last retreat?
 - Ask the chapter members what they liked/did not like about the last retreat and make the necessary changes.

Conclusion

Congratulations, you are now ready to set the tone for your chapter. Remember to rely on the best resource that you have – your brothers. Seek respected opinions on the layout of the retreat, material covered, and desired outcomes. This resource is just the beginning of planning an effective retreat. Think outside the box and add to this guide if need be. Good planning and effort will ensure that your chapter will benefit from this time spent together.

Retreat Checklist

Though each retreat will be different use this general checklist to make sure you have the basics

- Date of retreat
- Define retreat purpose
- Begin planning goals and objectives
- Determine attendees
- Determine location and make reservations
- Determine budget limitations
- Get paper, pens, binders, flip charts
- Invite facilitators
- Set the agenda
- Make confirmations with location
- Compile binders with retreat material
- Get food and snacks
- Send reminder to brothers
- Post goals