

Back-to-School Retreat

Updated June 2017

Logistics	
Presenters	Chapter President and Chapter Counselor
Room Set Up	
AV	-Computer and projector (for taking notes or looking at the chapter calendar)
Supplies	-Nametags -Sharpies -Copies of the meeting agenda (Attached at the bottom) -Copies of the multi-year goal report / momentum map -Copies of summer support plan -Copies of CPLA, Keystone, most recent LC Visit Report -Flipcharts (for taking notes or brainstorming) -Snacks!

Session Notes	
<p>Ideal timing:</p> <ul style="list-style-type: none"> • Weekend before classes start and at least 1 week before the first chapter meeting of the semester. • For schools with formal recruitment before or at the beginning of the fall term, this retreat should take place before recruitment starts. • Plan for a minimum of 3 hours. • Ideally, this should be a half- or full-day retreat, with meals included and a fun group activity at the end. <p>It is important for the following people to be invited to the retreat:</p> <ul style="list-style-type: none"> ○ Executive officers (required) ○ All advisors (required) ○ District Chief (strongly recommended) ○ House Corporation president or alumni representative (strongly recommended) ○ Other people to consider inviting: <ul style="list-style-type: none"> ○ Leadership Consultant ○ IFC advisor or member of campus fraternity /sorority life staff ○ Other campus professional to serve as facilitator 	

Session Objectives/Learning Outcomes	
Outcomes	-Foster relationships among exec, advisors, alumni / house corporation, and GFOs -Well-developed calendar and task list for the fall semester -Regroup, Revisit, Reenergize!

Participant Work	
Pre-Work – done by chapter president and the executive team	<p><u>One month before retreat:</u></p> <ul style="list-style-type: none"> -Set the date, time and location of the meeting. <ul style="list-style-type: none"> ○ Not everyone may be able to attend. Schedule around the key players. ○ The ideal location is a large conference or meeting room on campus but be creative. Try to get out of the chapter house. -Clearly communicate the purpose of the meeting to all attendees. -Arrange for food or snacks. -Tell exec team to have fall calendar set by a week before the retreat <p><u>One week before retreat:</u></p> <ul style="list-style-type: none"> -Finalize agenda; send it out to the group along with advance reading materials or pre-work. <ul style="list-style-type: none"> ○ Suggestions for pre-work include CPLA report, Keystone report, recent leadership consultant visit reports, SCOE, and historical charts and graphs.

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	<ul style="list-style-type: none"> ○ Send the Momentum Map and Summer Support Plan if applicable in advance to all participants. -Confirm attendance and RSVPs. -Collect supplies. -Confirm room and food logistics.
Post-Work	<ul style="list-style-type: none"> -Organizer sends thank-you notes or emails to all participants. -Chapter president (or designee) collects all notes and action items and sends to all participants.

Session Outline

15/15	Welcome and Introductions: Chapter president
Notes	<p>Welcome back from summer break! I hope you all had a wonderful time and had fun the past few months.</p> <p>Let's go quickly around the room and reintroduce ourselves as this may be the first time some of us have seen each other in months.</p> <p>Icebreaker</p> <p>Following introductions, it's important we all get comfortable communicating with another. Remember that we only have 15 minutes scheduled for this, so use your best judgement based on group size. Here are some suggestions:</p> <ul style="list-style-type: none"> - Break everyone into pairs; each person interviews his partner and then introduces his partner to the group. "Interview questions" could include hometown, profession / major, one hobby or interest, and one "fun fact." - Everyone gives a "Top 3." Could be top 3 vacation spots, top 3 bands you've seen in concert most often, top 3 foods you love, etc. - Two truths and a lie. Everybody writes down two truths about themselves and one lie and the group must determine which fact is the lie.

30/45	Review of purposes and goals of meeting – Chapter Counselor
FC	<p>The overall purpose of our meeting today is to continue to foster relationships among exec, advisors, alumni / house corporation, university officials, and GFOs. Through this we will be able to regroup as a team, revisit our current plans, and reenergize ourselves for the coming academic year. Around the room you will notice that we have several pieces of flip-chart paper up that read "Desired Outcomes," "Guidelines," "Resources," "Accountability," and "Consequences" and we are going to fill those out together.</p> <ol style="list-style-type: none"> 1. Desired outcomes: what do we want to get out of today's retreat? Ex: To feel more educated on what we need to do, to be more focused on our goals, etc. 2. Guidelines: what kind of guidelines do we need to work together today? Ex: One person talks at a time, each person listens, keep an open mind, etc.

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	<p>3. Resources: what kind of resources do we have at our disposal? Ex: Experience, CPLA, Keystone, LC Visit reports, summer support plan, momentum map, etc.</p> <p>4. Accountability: who holds us accountable? Ex: Chapter members, each other (advisors, exec), university, general fraternity, etc.</p> <p>5. Consequences: what are the consequences of our success or failure today? Ex. We are successful prepared to take on the next semester or we won't know ow to do our jobs, meet deadlines, and successfully manage the chapter, etc.</p> <p>Great thanks everybody. We will reflect on these as we move forward with today's retreat.</p>
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20/65	Convention Review: Chapter Delegate
	<p>Convention delegate reports on what they learned at convention, including key pieces of legislation that were passed. This is especially important for colonies to report on their colony review and action plan created following that. All groups review any new code changes voted on at convention and how/if that effects the chapter/colony.</p>

10/75	Break: All
	<p>This will be a good time for everybody to take a break, grab a snack or drink, use the restroom.</p>

90/165	Review of Keystone, CPLA, LC Visit Reports or Momentum Map / Summer Support Plan: Chapter President
	<p>This next section we will revisit the plans and the resources we used to build those plans. We will touch base on how the goals we set and whether or not those goals were accomplished. This section will also include officer, advisory, and house corp. reports.</p> <p>Pair off exec and advisors with each other, adding other attendees as needed and assign sections from reports appropriately. Identify successes and failures from plans and other documents. Create a running list of where the chapter can continue to build off of, or where it will need to pick up some slack.</p> <p>Officers will give individuals reports on their progress on goals through the summer and how they plan to build on that for the coming semester.</p> <p>Advisors will give individual reports on how they works with their advisee throughout the summer.</p>

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	House corporation / alumni should actively participate in the group most relevant to their work or experience.
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10/175	Break: All
	This will be a good time for everybody to take a break, grab a snack or drink, use the restroom.

90/265	Fall Planning: Chapter President
FC	<p>Based on our overall goals, we should think through what needs to get done over the semester to keep the strong momentum we have developed during the summer. Also review the fraternity's mission, vision, and core values.</p> <p>Exec members and advisors pair off again and create 2-3 goals for their position. These goals should be Specific, Measureable, Attainable, Realistic, and Timely (SMART). These goals are to be written down and collected, even if they are not used for the overall team goals. These are each officer's personal investment in their position. Keep the goals positive! (20 minutes)</p> <p>Ask the group: <i>What are the biggest areas we need to focus on this term? Where do we need to make the biggest impact?</i> (hint: Recruitment, engaging seniors, alumni relations, community service, etc.) (5 minutes) Reminder! This should not be brainstorming new initiatives or goals – it should be building upon the goals developed at Keystone and mapping progress against those goals.</p> <p>Summarize points and have the group agree upon 3 or 4 of these topics. Make sure these are ideas they are onboard with, not just your ideas dictated to the group. (10 minutes)</p> <p>Now that we have agreed upon where we need to focus, we must determine the actions that need to be taken to accomplish them. Are the actions in the Keystone plan still relevant? Do we need to re-do any actions or tasks? Take the next (20 minutes) to:</p> <ul style="list-style-type: none"> • Identify key roles for various individuals and assign responsibility • Determine who the responsible person will report to establish a way to monitor and report on progress • Celebrate success once that goal is completed <p>The VP of Communication will compile these goals into a recap document and send out in the next week.</p> <p>Measuring the outcomes of our goals will determine whether we were successful. To determine these outcomes, chapter leaders should keep track of the number of times the established actions are completed compared to the number of opportunities we had to complete the action. (5 minutes)</p>

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10/275	Wrap Up/Conclusion: Chapter Counselor
	<p>Thank everyone for coming and dedicating their time to the success of the chapter/colony, especially the volunteers and campus professionals.</p> <p>Remind everyone that the notes and action items from the meeting will be sent out in the next 5 business days.</p> <p>Sing the Doxology (or other preferred song).</p> <p>Encourage group to go and grab a meal together.</p>

Sample Meeting Agenda

1. Welcome and Introductions: President – 15 minutes
2. Review and purpose of meeting: Chapter Counselor – 30 minutes
3. Convention Review: Delegate – 20 minutes
4. 10 minute break
5. Review of Keystone, CPLA, LC Visit Reports or Momentum Map / Summer Support Plan: President – 90 minutes
6. 10 minute break
7. Fall Planning: President – 90 minutes
8. Wrap Up/Conclusion: Chapter Counselor – 10 minutes