

Theta Chi Fraternity

Chapter Operations Manual



Retreats &
Transition



Theta Chi Fraternity Retreats & Transition Operation Manual

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INTRODUCTION

MOMENTUM - A WORD USED OFTEN TO DESCRIBE A WINNING TEAM WITH A WINNING ATTITUDE

Your chapter's intramural volleyball team is the class of the league. However, as most of us have experienced with sports, teams tend to hit low points in their season. Suddenly, an opponent runs off 12 straight points on your defending volleyball champions and there just doesn't seem to be anything the Theta Chi team can do correctly. The men are flat on their heels. You are the coach. You realize you need a time out to regroup the team.

This event - a lack of momentum - is not only limited to sports, but also applies to your chapter. As the president or executive committee of your chapter, you can also call a time out to regroup your team. With a fraternity chapter, it will take more than two minutes.

You need a **chapter retreat!**

WHAT IS A RETREAT?

A retreat is much more than an extended meeting. It is a time for a chapter to get together, evaluate, reflect, set goals, and plan their course of action. The retreat is designed to harness the ideas and opinions of the entire chapter and release them in an arena, which is receptive to discussion. Once these ideas are brought forth, they are molded into policies, which are reflective of the chapter as a whole. These are the goals and policies, which will lead the group until the next such retreat. A retreat is an opportunity to work out problems with a minimum amount of distraction. This type of format has a broader and longer lasting effect on the brotherhood than a few minutes in a meeting.

In Theta Chi, a retreat is a time to strengthen our brotherhood through the sharing of ideas. Many chapters complain that they have a small percentage of their brotherhood participating in events. One would imagine that they do not involve a large percentage of their brotherhood in formulating decision-making. It has been said that "People tend to support that which they help create." The entire brotherhood has to feel that they have had some input in the decision making process. Otherwise, they feel alienated and unimportant. The retreat is also a time to get away from the pressures of school and become closer with your brothers.

Above all, a retreat is a catalyst for change. All too often, chapters slip into a groove that takes hard work to get out of and is too easy to continue. By getting into a new environment for the weekend, the chapter is making a change in itself. The retreat guidebook was written to help you put together a plan to set and achieve goals. Perhaps the most important pre-retreat plans you can make are to discuss the idea of a retreat with the group that will be involved. The group must identify training and retreats as necessary for its own growth and improvement. Therefore, your first task as a leader is to obtain commitment from your group members for such an event to occur.

Commitment is a strange thing. It is usually given when people are excited about an idea. The best way to motivate a group toward committing to a retreat is to expose them to what a retreat can offer. Even after this process, it is still a group decision about whether such a retreat is a high priority need.

Aside from the planning, there is need to understand and restate the basic purposes in retreats. Retreats are held for a couple of basic reasons. Often the group feels a need to establish some working and personal relationships from the very beginning that will help everyone to work together for the year or semester. If the retreats are done after the first semester, then the focus is often on solving communication problems that have occurred. It is a time to set goals as a group that will benefit your group.

THE BENEFITS OF A RETREAT

A retreat for your chapter can be an opportunity to:

1. Set chapter goals.
2. Discuss openly the problems and difficulties facing the chapter.
3. Discuss openly and discover what the fraternity can accomplish.
4. Get away from campus for a time of re-evaluation and reflection.
5. Determine where the chapter stands and decide where they want it to be headed.
6. Strengthen chapter unity.
7. Think positive, don't make it a "gripe-session."
8. Review your responsibilities, as individuals and as a chapter.
9. Get things that need to be discussed out in the open.
10. Give individuals the necessary opportunity to solve fraternal problems.
11. Have a smoother transition for new officers; giving them the opportunity to develop their leadership skills before the semester begins.
12. Better understanding of the value of group decision-making.
13. Encourage creative thinking and new ideas.
14. Improve spirit, recognize leadership, and motivate brothers to get involved in Theta Chi.
15. Have a good time!
16. Incorporate all members' ideals and aspirations into decision making and overall planning.
17. Expose the strengths and weaknesses of our chapter.
18. Discover a common bond.
19. Measure the chapter's effectiveness and define its potential.
20. Put priorities in order.
21. Get away from the campus and its demands.
22. Share and discuss our purpose for being Theta Chi brothers.
23. Benefit, not just for the very strong or very weak chapters, but all chapters.
24. Challenge to see if you can follow as well as lead.
25. Look at things in an objective way to learn how to appreciate this brotherhood we call THETA CHI.

PLANNING AND ORGANIZING RETREATS

ORGANIZING OFFICER RETREATS

The officer retreat is the planning phase for your entire semester/ quarter goals and policies. The officers should come out of this retreat with an agenda, which they encourage the members to meet. If it is a period of officer transition, this retreat will be instrumental in the training of the new officers. All outgoing and incoming officers should be required to attend.

ORGANIZATION

Keep it simple. The fewer people participating in any retreat the easier it will be to accomplish your goals. Who's in charge? The president. If it is a transition retreat, we suggest the outgoing president to be in charge. This is one of his last duties as president and should be considered of utmost importance.

PREPARATION

If you have always had some kind of orientation workshop for the new officers, great! You have a tradition of having something. If you have never had anything like a retreat/ orientation workshop, then this is a good time to start the practice. Immediately after the elections the out-going president and the president-elect should go over the general state of the chapter: Ask questions like:

"Why was our recruitment attitude so poor last term?"
"What are the problems with new member education?"
"Why is the attendance at meetings so poor?"
"How well is our committee system working?"

This, coupled with the new administration's goals, makes the subject material of the retreat easy to plan. Outline a simple agenda, make copies of it and distribute them, set the time and date, and you are set. Make sure that the time is agreeable to all of the officers. Avoid conflicts in scheduling by planning it early. During officer elections, each officer should have an agenda for his assimilation and planning for the office. The brotherhood should take this into consideration when voting on nominees.

PLANNING

Get the input from all of the officers when you plan a retreat.

Where can we have an Officer Retreat? It is essential to get away from the house or residence hall. This retreat is for the officers and so elimination of all distractions is essential to concentration. Find a location that has a large central room that can seat everyone. This can be a member's parent's home in town, or at an alumnus' summer cabin.

How long will it last? Plan from your agenda to work about four hours. This can be broken up into one-hour discussions and exercises or two-hour long sessions with plenty of time for breaks and recreation. If you are going overnight, four hours of discussion and exercises is all you need in a day.

Remember this point: One of the main reasons for having an Officer Retreat is to begin to establish the cohesiveness and team spirit among your executive council. Just the fact that you are together and talking about your goals, whether it is in the discussion groups or over a game of pool, is important.

Who should be there? All of the outgoing officers and incoming officers should be present. This responsibility should be communicated to an officer at this retreat. The training of the new officers is imperative for the well being of the chapter. Invite some resource people. This can include the Dean in charge of fraternities on your campus, the alumnus advisor, regional counselor, or IHQ staff. Extend these people an invitation to lead a discussion pertinent to the newly elected council. Make sure to extend this invitation well in advance (at least 3 months), as most of these people have busy schedules.

DISCUSSION AND EXERCISES

Here are a few ideas for the purpose of setting new goals and defining problems. Keep in mind that in order for some sort of success to be achieved, immediate and long-range goals need to be set.

General Discussions and Warm-ups: (allow 20-30 minutes)

Ask the question to the Officers: "What are our traditions in the chapter and what do you think their values are?"

- What are the traditions?
- What are their long- term values?
- How long have they been around and are they still viable?
- What are their implications?
- Is it easy to start a new tradition?
- What makes a tradition stick?

Ask the question: "Why would you join again and what would you like to see different in the education process?"

As you can see these are general discussions that can get the group "warmed-up" to some good communication.

EXAMPLES

Request that each officer prepare a calendar and budget for their office. Have the officers offer their calendars and budgets for discussion. The officers then modify and approve each budget to meet the goals that they want to achieve. Once this is done, each officer has only to sell his ideas to the entire chapter at the beginning of the school year. This is helpful so an officer does not just "plan as you go."

Make a list of what you think the members of the chapter expect of you in the office you hold. List between 5 and 8 points and prioritize them. Then make a list of what you expect of yourself as an officer. Then have the group comment on what they think of what you have compiled. An endless amount of suggestions will come from the group. Another way of doing this is to have the group switch roles. You write down what you expect of the recruitment chairman, social chairman, or an officer other than yourself. Compare these with what the actual officer has written. The results will provide some good discussion. You should allow one hour for this activity.

Have a short oral survey from the group. List five major problems of the chapter and five major goals.

1. Goals: (Determining what ought to be)
Where do we want to go?
What are we trying to accomplish

2. Ideas: (you will now define the problem)
How can the goals be reached?
List the different ways to solve the problem.
List as many ideas as you have. Everyone's idea is important.
3. Rank Order Your Ideas and Solutions:
Look to see if each idea is realistic.
Do the ideas/solutions accomplish what you want them to?
What is the effect of your idea?
Put ideas/solutions into general headings listing the most important first and so on.
4. Organize:
Who will be responsible for implementing the plan?
Who is willing to work on it?
What resources can we use?
When will it begin?
Does it have a termination date?
5. Re-evaluate:
Will it accomplish everything you want it to?

EXERCISE

This is an exercise in "Selling." Divide the officers up into groups of two, so that for example you have 4 small groups. Each pair is required to figure out a project that takes participation by the entire chapter under their leadership. You may want to prepare the example projects before you go on the retreat (saves time!). A good amount of planning is involved, but condense it to the major points.

Remember Sell, Sell, Sell the project. After the teams have worked out the project in preparation of the sell job to the entire group, form into the large group again. The teams then make their presentations as they would at a chapter meeting. During the presentation the group is encouraged to ask questions, etc. Encourage the group to offer suggestions and modify the project if they wish. The main purpose of this exercise is to give a brief experience in the presentation of a project to the chapter. It's practice in selling.

Here is an example:

A team decided to introduce as their project "Spring Parents Day." They thought of five reasons to have a Parents Day. The team went over the organization and how it would work. A committee was suggested. Everyone in the chapter would be involved in some way. The team also estimated how much it would cost, the time involved, and the logistics. The group then criticized the project on a few points and questioned the plan in depth. It was a success because the officers were sold through an organized plan of attack from the team.

This exercise shows two major points:

- 1) The team picked a topic that was new and then successfully convinced the group that it would work through some good organization. It would succeed because it would benefit the chapter. It was sold to the group through a good, enthusiastic presentation. They learned how to sell.
- 2) As a sideline to this exercise a new idea was generated and the chapter can now see a Parents Weekend as a realistic goal. You can adapt most any form of exercise or discussion into an officer retreat.

THE WRAP-UP

There are a variety of ways to get an evaluation or "wrap-up" from the officer retreat. For an officer retreat you will want to take back to the chapter a report of what you accomplished. First, at the end of the retreat have the officers, sitting in a group session, answer these general questions:

1. Did this retreat answer any of your questions about your role as an officer? Be specific.
2. Did this retreat change any of your attitudes? Which ones? Secondly, so the president can inform the chapter of what happened at the retreat, you might want to complete a brief description of each exercise, being concise and to the point, or you could complete a very brief consensus survey. Here is an example:
 - a) Which part of the retreat did you feel was the most effective?
 - b) Which was the least effective? Why?
 - c) What new concerns issues or problems were identified?
 - d) What were the positive goals that were set?
 - e) How can a retreat be beneficial to the chapter?

REGIONAL OFFICER RETREAT

A regional officer retreat would serve to only increase the benefits and accomplishments derived from an officer retreat. Contact your Regional Director or Regional Counselor for assistance in organizing a regional officer retreat.

Suggestions:

- The Regional Counselor can organize a faculty of volunteers to teach specific issues facing the chapters.
- The respective officers from each chapter could be grouped by office. The discussions would involve how they are dealing with specific issues at their respective chapter. It would be most beneficial to have a discussion with those who are in the identical position as yourself.

The regional officer retreat can also serve the International Fraternity as a means of educating the chapter officers on new policies such as risk management, hazing, and other issues Greek organizations are facing.

The Regional Officer Retreat is a great idea and would be most beneficial to all of the chapters in your region. Be an innovator! Contact your Regional Counselor and help him organize your first Regional Officer Retreat. We look forward to the day when the Regional Officer Retreat is as traditional as the Mid-Year Leadership Challenges.

THE ALL CHAPTER RETREAT

This is the largest and most extensive of the retreats. It should take place following the officer retreat. This section on all chapter retreats is designed to give you, the leaders and organizers, a basic framework. Add your own ideas when planning your retreat.

PURPOSE

The purpose for having an all chapter retreat can be for any or all of these reasons.

1. Organizing
2. Motivating
3. Discussing, formulating, and approving goals and policies.
4. Developing a sense of brotherhood and participation for all.
5. Revealing strengths and weaknesses of the chapter.
6. Addressing and solving specific issues and/or problems facing the chapter.

ORGANIZATION

An event as important as a retreat is to your chapter, needs thorough preparation. The key to a well attended, educational and a successful retreat is to involve everyone in its planning and preparation.

Who's in charge? An all chapter retreat needs a Chairman, a standing committee, and discussion and exercise leaders. You need to involve as many people as possible in running the retreat. The chairman of the all chapter retreat should be appointed at the officer retreat. The chairman should have good organizational skills and be able to work well with others. He should be someone who has a good knowledge of the chapter's problems and capabilities. The chairman has the duty of coordinating every aspect of the retreat. He is the person who explains the responsibility and ideas for the direction in which the retreat is to go. He has to spread the responsibilities throughout the brotherhood. All too often the retreat chairman keeps it a one-man show. This is a fatal mistake. It is not a dictatorial position, but one of coordinator: the team captain!

Responsibilities of the Retreat Chairman:

1. Selecting and obtaining facilities for the retreat.
2. Planning a budget.
3. Planning the agenda.
 - a. Discussion & Exercise Topics: (with executive council)
 - b. Recreation: To plan activities and make sure all materials and equipment are available for the recreation during free time.
 - c. Meals
 - d. Speakers & Resources: Taking care of guests
4. Obtaining resources needed for retreat: materials, printing of agendas.
5. Delegating responsibilities to members of the retreat committee and interested brothers.
6. Appointing the discussion/exercise leaders and committee.

While the Retreat Chairman is responsible for these aspects in preparing the retreat, this does not mean that he is to carry out these duties alone. The chairman should delegate the responsibilities to committees.

The different committees of the retreat are:

Budget -- *make sure that all costs are accounted for and kept at a minimum.*

Housing -- *Locate and secure facilities.*

Meals -- *If meals are not provided by the facility, responsibilities should be divided up among groups of brothers. For example, one group cooks, another cleans up, and another is entertainment (tasteful). Also, be responsible for bringing different types of food.*

Discussion and Exercise Groups -- *find suitable topics from this guidebook or other resources.*

Recreation -- *Plan activities and make sure all materials are available for recreation.*

Speakers and Resources: *find them and make sure that they understand exactly what their role is.*

Materials -- *printing of agendas, getting the blackboards, chairs, etc.*

Evaluation and Wrap-up -- *make sure that all of the topics and discussions are recorded. After the notes have been turned in, compile them and see that each member gets a copy.*

Leaders of Discussions and Exercises: Discussion and exercise leaders have one of the most vital roles in the retreat. Your leadership and ability to communicate the job at hand is imperative. First of all, you must have a full understanding of what is going to be accomplished. Understand what the members would get out of an hour in a problem-solving situation. Anticipate! Your job will be to organize an understandable, concise and stimulating experience of trying the idea or discussion topic. You will already have the experience of trying the idea out on the retreat committee or executive council a couple of weeks ahead of time. This "dry run" will help you anticipate what may happen. You have to anticipate anything that may happen. Be prepared to keep the exercise/discussion moving and for the members to get something out of the hour they have spent. As the leaders of a discussion or exercise, your responsibilities are:

1. When you select the topic, make sure that it follows the theme of the retreat.
2. Involve the entire membership in the exercise or discussion. This means that you might have to call on a member or new member if you feel he has something to offer, but is too hesitant to volunteer his opinion to the group.
3. You cannot rely on your fantastic personality to carry you through an hour. The more people you have doing the talking the better. Remember, you are there to facilitate the discussion.
4. Research: find a discussion or exercise that fits the subject and can cover the entire area to be discussed.
5. Get the members and new members to solve the problem.
6. Keep the group enthused and have good discussion until the end.

7. Make sure that if you divide into small groups that they are equal and not overloaded with all seniors or all new members.
8. As leader, float around the small groups. Make sure they are staying on the right track.
9. Read through Exercises and Discussion Topics of this manual.

While the Retreat Chairman and his committees are responsible for the organization of the retreat, the executive officers have duties, which are just as crucial to the outcome of the retreat.

Duties of the Officers:

1. Help the chapter organize its thoughts for a purpose and goal.
2. Stage, in the very beginning of planning, a general review of the major problems facing the chapter in order to discuss and propose ways to solve them at the retreat. (i.e. Officer Retreat)

PREPARATION

This is crucial. An all-chapter retreat must be well prepared. Preparation should begin at least a month in advance. At this time the chairman is named and the committees assigned. The date is set! Clearing way on the calendar is really best done at the beginning of the year due to school activities, sports, and chapter events. Plan early and make sure the date is convenient for all.

PLANNING

Where can we have the all chapter retreat? Unlike other smaller retreats, the place you have the all chapter retreat must be large enough to house or seat the entire membership. The facility should have a large central room for everyone to meet at the same time. It should also have other areas for small group discussions. Chapters have used a variety of locations.

The ideal location will take the membership away from the campus environment. A camp or a lodge are good examples that have been successful in the past. This isolation lends itself to a break from the ordinary and a feeling of taking a journey. The retreat is a time when you need a maximum of concentration. You are getting away to do just that. In summary, keep these ideals in mind when locating a place to have the all-chapter retreat:

Cost: Keep it within your means. Stay within your budget.

Facilities: Large enough meeting rooms. Away from campus.

Availability: Set the date early.

Distance: Make it nearby, thus avoiding transportation problems.

Be honest with the owners of the facilities. Tell them your purpose and the nature of your group.

The reasons behind holding the retreat away from the house are many:

- It eliminates the everyday distractions, allowing for a concentrated effort by all of those present.
- It provides for a unifying spirit. This results from the strange environment, with the only familiar objects being the members themselves.
- It fosters greater creativity. This is in line with the principle used in business, which says that productivity is increased when there is a change in the working environment.
- It creates more of a sense of commitment for the members to have to go more out of their way to attend. It is too easy to go downstairs to the retreat, and again it is very easy to go back to your room at your leisure.

What is the length of an all-chapter retreat? Two days is the usual length with about 4-5 hours of work each day. If it is beyond your means to stay overnight, then schedule one full day with plenty of time for driving.

Who should attend? Obviously, the people who attend the retreat will receive the most benefit. Therefore, a large attendance will increase the retreat's effectiveness. However, do not make attendance mandatory. A person who is forced to attend will only destroy the spirit of the retreat and can turn it into a disaster. The members who attend on their own will be interested and willing to devote the time to the subject at hand and more will be accomplished. As often happens, those who do not attend are often the core of some of the chapter's problems. Therefore, it is the job of those who attend to communicate the details of the retreat to them on a personal basis. By doing this, chances are that the next retreat will meet with greater attendance - especially if the first one ran well.

All members and new members should be encouraged to attend. New members should be included because the purpose of the retreat is to improve the chapter. The new members are the future of your chapter and they, most of all, should be able to express their opinions on future policies and goals. Depending on the subject matter, you may want to include outside guests. Be sure their presence will serve a definite purpose and be an asset to the retreat.

When should we have the chapter retreat? The time the retreat takes place and its duration are important factors in the retreat's overall success. Once it has been decided that a retreat is necessary, the date should be set as soon as possible. This gives the members ample time to make arrangements to attend. The date or dates should be such that they do not conflict with school events, such as football games or exams. One point to keep in mind when choosing a date is that if short-term goals are one of the objectives of the retreat, the retreat should be timed when these goals can be accomplished shortly thereafter. Vacations and other such breaks often interrupt progress and the goals are often forgotten.

Selecting a Theme A theme is very important to the overall success of the retreat. It can hold the entire program together while trying to accomplish many different things. It gives continuity to the structure and provides a pattern to follow in different discussions and exercises. The theme of your retreat should reflect the current state of affairs in the chapter. If you are having a serious recruitment problem, then a recruitment retreat focused on solving the key problem should be the theme, and so on.

The majority of chapters choose to have a retreat for a more general purpose. These retreats choose themes first and plan around the themes. Here are some examples of themes used for retreats:

- "The Only Way to Stay Best is to Get Better"
- "Let's Create Our Goals"
- "Theta Chi is Sharing"
- "Development of a Better Chapter"
- "Communication"
- "Summer Planning Retreat"
- "Goals and Objectives"
- "Retreat for the Common Bond"
- "A Retreat Can't Solve Our Problems, but gives us the tools to solve them back in the Chapter"
- "You Have to Know Where You Are to Know Where You're Going"
- "Rediscover the Pride in Your Chapter"
- "Learning the Pros and Cons"

The list can go on and on. Choosing the theme should be group projects. Ask for suggestions from the members. Tell them what a retreat can be and discover their goals. Use them as a central plan for the retreat.

Getting the Brothers Psyched Up The chapter should have a desire for the organization, or at least a desire for change and improvement in its operation. You must convince the chapter that a retreat can help them realize their goals. The key to getting members psyched up to participate in the retreat is first to talk about positive aspects of having a retreat. The members and new members will usually want to have a weekend to get together. Let them know it will be a good time as well as some work. There will be plenty of time for recreation and new ways of learning how to solve the chapter's problems. More importantly, it is a time for all members to be heard.

One of the biggest selling points of the retreat is the location. Choose a site that will be attractive. This can mean having the retreat at a mountain lodge, lake or as a camping trip.

Invite a resource person to come in to the chapter and talk about the successes of retreats. There should be someone on your campus that has had experience with retreats.

It is sometimes difficult to justify having a retreat with all of the other activities a chapter has on its agenda. The point of which members must be convinced is that goals and objectives need to be set each year. We must find a collective way of solving problems. Sharing and communication are the most important things to be gained from a retreat. It is up to the chapter to give it a try and find a common bond. Retreats do this!

Developing Human Interaction The focus of any retreat or workshop must, at some time, address communication and relationships, since human interaction must happen before any productive decision-making can occur. Therefore, all through the process, it is important to provide the opportunity for human interaction. Your retreat goals of human interaction and communication can begin to be fulfilled when you decide to have a retreat. Interaction will occur when you form committees. Interaction will occur when people travel in cars together to the retreat site. Interaction will occur when people work together on a team.

As stated before, there are several ways to begin to participate in group activities. The following are descriptions of some ideas that have proven successful to cause the interaction for other groups.

The Carpool: Perhaps the easiest way for people to get to know each other and begin to interact is to be in a closed environment for an extended period of time. Carpools are the answer. If you ask everyone to put themselves in a car, then you will naturally end up with people who already know each other riding together. A much better way is to allow the transportation committee to set up the carpool. In one of the first meetings that your entire group has, you can get them to fill out information cards that look like the sample below:

<u>CHAPTER RETREAT</u>	
Name _____	
Office _____	
Can you provide transportation? _____	
If so, how many can fit in your vehicle, including you? _____	
What time can you leave? _____	

This will give you all the information necessary to set up carpools that mix individuals who usually would not interact with others on their own accord. It is an easy way to start the interaction on the road.

Musical Cars: Musical cars is another road game that will help to make your drive a lot more interesting. All the cars decide on a rendezvous point somewhere around halfway, and at this point everyone gets out of the cars and switches into another car. Make sure you do this in a safe place off the main highway!

Car Tasks: Yet another way to get people to interact, and gets some work done at the same time, is to assign car tasks. Each group of cars will probably be leaving at various times, and there are various things that need to be done for preparation of the retreat site. Assign one car the task of opening and airing the facilities. Assign another the task of having the food purchased and packed away. In this process, the last car to arrive is ready to participate, and all the details are ready for a great retreat!

Pre-retreat Meetings: The meetings that your group holds before the retreat can be very important in helping interaction. It is always a good idea to hold a meeting a couple of days before you depart to go over plans, and to afford the group the opportunity to air any questions they may have about the retreat.

RESOURCES

Your most important resources are your members. They know what the problems are and what their own goals are (it is the retreat that will bring them out into the open). It is your duty as organizers to decide what needs to be worked out in the retreat to fit the attitude of the chapter. Through discussions with officers and question and answer sessions during chapter meetings, a format for your retreat (in conjunction with this guidebook) will come about. Lastly, do not hesitate to ask for the helping hand from our members in other chapters. You may also obtain assistance and information from the Executive Office and from the Leadership Education Consultant that visits your chapter.

DISCUSSIONS AND EXERCISES

Keep in mind when choosing different types of discussions and exercises to make up the working part of your schedule that the main purpose of having an all-chapter retreat is to foster better communication among the members. Not all of the exercises and discussions in this guidebook will fit the needs of your chapter. You may want to innovate. The examples are just recommended for conducting problem solving/goal setting discussions. Choose a variety of discussion/exercises. Do not limit the program to "case studies" or just "role playing."

WRAP-UP/EVALUATION

For an all-chapter retreat the wrap-up can come in variety of different ways. Most chapters find the discussion type to be the best. It is simple. At the conclusion of the retreat schedule an hour or so to discuss what has happened. Pose a question like this to the group and have each person answer it how he feels: "What was the most valuable thing you learned at this retreat?" If you feel that your retreat needs some further documentation, have a survey at the end or keep a record of all the discussions and exercises.

Goals: A chapter should emerge from a retreat with specific goals to implement their plans. To be of maximum effectiveness, chapter goals should be:

- a. Determined by the entire membership.
- b. Measurable.
- c. Realistic.
- d. Put into written form; this makes goals specific and visible.
- e. Progressive; striving to maintain the status quo may lead to back-sliding.
- f. In some cases, long range; a five-year plan forces the members to consider the chapter's destiny. If also requires a series of immediate goals which will help ensure the realization of the ultimate objective.
- g. Positively stated; e.g., "Our new member retention rate will be at least 90%", instead of, "Our drop-out rate will not exceed 10%".
- h. Limited to a deadline
- i. Of such nature that the members will be able to visualize the results and recognize benefits.
- j. Such that each member feels personally involved in most of the goals. When the goals are formulated, all chapter planning and activities shown revolve around these goals.

Progress must be constantly evaluated, and every hint of progress should be praised. Follow-Up. These goals need to be recorded and displayed prominently for easy and constant evaluation. The members must be constantly reminded of their commitment toward the chapter. The spirit developed during the retreat should not drop after one week.

HINTS FOR THE RETREAT DIRECTORS

The one thing that is most important for the director to remember is organization. The retreat must be set up to achieve the desired goal(s).

The following are important points to remember:

- Make sure everyone knows when and where the retreat is to be held. If the retreat is to be held away from the house, make sure transportation is arranged for those who need it.
- All people involved should be aware of the purpose of the retreat. In some cases, it may be valuable to leave the details of the techniques to be used at the retreat a secret. This eliminates the possibility of people coming with preconceived ideas or programmed responses.
- Hold regular meetings with the discussion/exercise leaders and give a week to report to the executive council.
- An agenda should be drawn up and distributed to all in attendance. Try to stick to the agenda, but be prepared to be flexible.
- Work closely with the officers in making sure that everyone has an input. Have plenty of open discussion. Develop the plan within these sessions.
- Have someone take complete notes or tape record the discussions for additional evaluation at some later date. One important factor is to make sure all proposed goals and courses of action are written down in a concise manner with a time schedule towards the goals' completion. It is a good idea to post these goals and the deadline of implementation so that all members will be aware of the chapter's progress.
- Save all materials for reference on later retreats. This eliminates "reinventing the wheel" and aids the next director when he sets up a retreat.

HOW TO REDUCE RESISTANCE TO CHANGE

Be prompt. Announce an impending change as quickly as possible. Do not give the rumor mill a chance to grind out stories that are not true.

Explain the reasons. Tell members why the change is important and how it affects them. Will it help the organization prosper and the members, too? If you distort the reasons, members will be doubly antagonistic when they learn the truth.

Explain what the changes mean to the individual. Try to let each member know how the change will affect them. Explain the benefits and pledge to protect your people against losses.

Ask for advice. Many experts overlook the first-hand experience they can get from people who do the jobs. Your members can often point out the real pitfalls in a plan that looks perfect on paper.

Invite participation. People support that which they help to create.

Do not change for the sake of change. Some leaders try to prove their own worth by making frequent shake-ups in routines. Members know this and resist every change, even the worthwhile ones.

Avoid trivial changes. It might be handier to move a file cabinet, but if it causes a fight, why bother? Save your energy for more important changes.

Avoid surprise. Lay the groundwork carefully; discuss the problems caused by the old method and then suggest, "Let us try it this way and see how it works."

Be careful of status. Every group has status symbols that are zealously sought and jealously guarded. Do not let a change build one member's status at the expense of another's.

Keep out of ruts. A good way to pave the way for progress: Have members alternate duties as much as possible. A planned program of job movement will not let people become firmly entrenched in private little procedures. It cuts down on boredom and makes your workforce more flexible.

Avoid chain reactions. Do not unsettle your members by springing a batch of changes, one right after the other. Try to space them out or make one big change.

Sweeten one change with another. If you have to make a change that will not be popular, try adding some benefits to make it more palatable.

Do not accuse members of resisting change. It may be true, but most people do not realize it or will not admit it. You will only force them to try all the harder to prove that a new method will not work.

Allow plenty of time. Do not expect any new procedure, idea, equipment, or layout to be an instant success. It takes a while for people to adjust.

Watch for red flags. Hard-core resistance signals that something is wrong. When you face it, do not try to bulldoze the change through. Find out first why people do not like the change, and work from that point to soothe their fears or even to give a second thought to the proposed change.

Do not be afraid to say, "Forget it." If a change really is not any good- and some of them are not- why not call the whole thing off?

Remember, there are three ways to deal with conflict:

SOLUTION... involves accepting the conditions that produce the conflict and trying to get whatever you want at the cost of the opponent. This often creates conditions that breed future and often more intense conflict.

RESOLUTION... involves accepting the conditions that produce the conflict while trying to reach a compromise acceptable to both sides. This may stabilize the conflict but seldom does away with it since each side is denied something it deserves.

DISSOLUTION... involves changing the conditions that produce the conflict and thus eliminating the conflict. For example: Your chapter has only enough money to hold a mixer or redecorate the living room. Instead of trying to change those who disagree with your choice, hold a fundraiser and do both.

OFFICER TRANSITION

Officer transition is critically important in any corporation and even more so in a fraternity. A fraternity has an entirely new executive council each year.

Without the proper training and knowledge of previous actions and operations, the officers are going to be continually "reinventing the wheel." This manual will assist the outgoing officers in training the new officers to pick up exactly where they left off. It will also assist the new officers in becoming assimilated into their respective positions as well as a functional executive council.

This program will consist of three parts: officer notebooks, officer training or "shadowing", and the officer transition retreat.

OFFICER NOTEBOOKS

All too often great ideas and experience are lost due to a lack of communication between the old officers and the new.

Establishing the use of officer and chairman's notebooks is perhaps the best tool a chapter has to learn from the success or shortcomings of the past officers or chairmen.

Use of these notebooks can save time and resources for the chapter. "Reinventing the wheel" can be avoided by drawing on the experience from officers who have responded and met challenges that are similar to what you may be facing today.

The organization of an effective notebook is very simple. The notebook may be divided into several sections by binder dividers.

The first section consists of a record of semester goals and accomplishments for the office. The second section lists and describes the duties of the office. The third section contains a day-to-day log of the past officer or chairman's activities.

The fourth section contains reference materials and materials collected from conferences, conventions, campus resources, etc. Additional sections may be added as needed.

It should be stressed that the success of implementing these notebooks is almost entirely dependent upon complete participation by the future officers of the chapter as well as the current officers. One of the greatest benefits that the notebook offers a chairman, or officer, is giving him a review of what previous officers have accomplished and how they pursued their goals. Unless the experiences of the current officers are recorded, helpful information may be lost and a great deal of effort wasted. Stick to it. Your efforts will help the chapter long after you have graduated.

Notebook Section 1: Goals and Accomplishments

The first section is designed to offer the chairman or officer a chronological account of not only the accomplishments of the previous officer, but also the goals he had when he took office. How many times have "good" approaches or projects been attempted only to find after considerable effort the campus will not permit it, or the alumni will not support it, or that it was financially unfeasible? Often, the voice of experience is lost with time. We can learn from our mistakes as well as our successes...

The chapter vice-president will be given the responsibility to see that each committee chairman submits a goal form to the executive council for approval before appointment to his position. Also, it will be the vice-president's responsibility to see that all other officers, including the president, submit a goal form to the new executive council shortly after installation. It will be the duty of the vice-president to ensure through weekly or bi-weekly meetings that the officers and committee chairmen are making strong progress. The vice-president should keep the president and the rest of the executive council well informed of the progress of chapter toward particular goals, and noteworthy progress will be reported by the vice-president during weekly chapter meetings.

At the end of the semester, the vice-president should distribute accomplishment sheets. These sheets are not designed to humiliate lazy members or to boast about successes. They are to be completed to inform others how you accomplished particular tasks and what stopped you from accomplishing other tasks.

The accomplishment sheets should include recommendations for the priorities and goals of the incoming officer. Sample accomplishments and goals forms may be found in the back of this section.

If the vice-president meets his responsibilities, he will be one of the busiest and most well informed brothers in the chapter and should be very well prepared for the office of chapter president. Is the office of vice-president, second in command, used to its potential in your chapter? If not, consider expanding his responsibilities to include committee and officer goals follow-up.

Notebook Section 2: Duties of the Office

Each officer and chairman should be aware of his responsibilities before he steps into his office. There are several ways to ensure a smooth officer transition. We suggest a short training period where the new officer works alongside the outgoing officer followed by a retreat with the new and old officers. These steps will help ensure a smooth transition.

Why should an officer or committee chairman limit himself, learning only of the duties of the office that the previous officer was executing? Chapter by-laws may be helpful, but most chapters do not explicitly state what the chapter expects from their officers. For this reason, officers such as Historian, Chaplain, and Librarian may do nothing, or very little for the chapter simply because they do not know what is expected of them.

Executive officers or important committee chairmen may perform poorly due to lack of preparation or incomplete understanding of their responsibilities.

A list of duties may be the only thing an officer may have to help him through his term. Simply listing tasks to be completed is not enough. Each officer or chairman should be given a complete "job description" including tasks that the chapter/colony feels should be completed or delegated by that officer or chairman. For example, forms that must be completed by the secretary should be included in this section along with a short description of the form and the date. The Marshal's book should contain the chapter's new member program and policies to ensure continuity. If the chapter is complete in assigning duties, every activity necessary for smooth operation of the chapter/colony will be given to one particular individual or committee. In the future, ambitious officers or chairmen may initiate new programs, or find new ways to expand their office. These should be recorded to ensure that they are implemented in the future.

Notebook Section 3: Officer Daily Journal

Chapter officers and committee chairmen should keep a day to day journal for several reasons. First, it may help another member understand exactly how much work is required of the officer. This may help prior to elections when a member is considering an office or chairmanship but is not sure if he has time to give his best effort. One member's idea of "I'm pretty busy" may differ greatly from another member. Another reason for a

daily journal is to give future officers better insight into how you completed your tasks, or how to best respond to particular people or situations.

Notebook Section 4: Resources and Publication

Every year, brothers from each chapter and colony attend either the Theta Chi School of Fraternity Practices/National Convention or the Chapter Leadership Conference. They also may attend Mid Year Leadership Challenges or Deranian Presidents Conference.

They leave loaded with new ideas and goals as well as general information on leadership, crisis management, legal liability information and many other important topics. Often, they take these new ideas and implement them in their respective office duties or advise others to improve existing programs.

Unfortunately, many other helpful programs and ideas are lost because the manuals remain on a bookshelf or in a file cabinet, never to be seen again until an industrious librarian decides to clean out "all the old junk" in the chapter files. Why not dissect these resource manuals and give them to the people who may use them? Legal seminal information could be given to the president, social chair, and Marshal. Information on motivation could be given to the rush chair and the Marshal. Each officer and chairman would be given plenty of new ideas each year.

Mid Year Leadership Challenges will supply useful notes and resource publications as well. Do not forget your Greek Advisor or campus activity offices. They have many publications explaining posting, recruitment, or alcohol rules. It cannot hurt to be better informed.

SAMPLE GOALS FORM

1. What is my office as I see it?

2. What is my office as others see it?

3. What ideas, goals, and objectives do I have for improving this office?

4. What programs, plans, and objectives that have been effective in the past do I wish to continue for my office?

5. What ways and means will I use to work with others to carry out my responsibilities and to accomplish my goals?

6. Five long term goals for my office:

7. Five short term goals for my office:

SAMPLE EXECUTIVE COUNCIL EVALUATION

How many successful younger brothers have we developed to continue after us as a legacy to the fraternity and to the chapter leadership?

Will the chapter be innovative and creative after we have served in office?

How many good potential leaders have we lost as a result of the lack of an opportunity to feel that they were sharing or involved in the future of the chapter?

Are we the only "driving spirits" left in the chapter ranks to keep it moving forward?

When we leave office, will the chapter be strengthened or weakened as a result of our leadership style?

What impact did our EC have on the chapter?

What impact did we intend to have on the chapter?

Are our successors better equipped and prepared for office than we were?

If we had it to do all over again, what would we have done differently?

What would we do again in the same manner?

Our greatest achievement as an EC:

Three things that we would like to have accomplished:

- 1.
- 2.
- 3.

Three things that we would like to see our successors accomplish:

- 1.
- 2.
- 3.