



ALPHA SIGMA PHI

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CHAPTER PLANNING RETREAT GUIDE

SUPPLIES

- Laptop with Wi-Fi access
- Whiteboard or flipchart paper
- Markers
- Goal Setting Guide (digital)
- Paper for each participant
- Pen for each participant
- Five criteria for establishing a goal written on flipchart or whiteboard

LOGISTICS

- Retreat should take place at a location with accessible A/V. There should be a chair and desk/table for each officer. Ideally, the room should be set up boardroom style.
- All incoming Prudential Board officers should be present at the retreat.
- If being paired with Officer Transition Meetings, the Retreat should occur after all meetings are completed.
- Plan for the retreat to last two-three hours.
- The retreat should be facilitated by Fraternity staff, a member of the Chapter Council, or a campus professional.

LEARNING OUTCOME(S)

- Chapter leadership will conduct a SWOT analysis.
- Chapter leadership will develop a shared vision.
- Each officer will share their goals for their term in office.
- Chapter leadership will develop goals for the upcoming year.

WELCOME AND INTRODUCTIONS - 5 minutes

INTRODUCTIONS (if needed)

- Introduce yourself and give background: Name, Chapter, College/University, profession, Fraternity involvement.
- Explain your role today is to facilitate and ensure conversation flows and our outcomes are achieved.
- Introductions of the officers if needed for facilitator.

PURPOSE AND EXPECTATIONS - 5 minutes

PURPOSE

- Congratulations on being elected to your position!
- The purpose of today is to discuss where the chapter/provisional chapter currently is and how we can move it forward together.
- Our goals are to take an honest look at the chapter/provisional chapter, develop a shared vision that represents who we want to be, and develop goals that will get us there.

EXPECTATIONS

- I'm asking that you all are engaged, challenge yourselves and one another (while remaining respectful)
- Let's agree to focus on what is within our control vs. what is NOT within our control (This is a big one!)
- Any others you want to share and hold each other to? (*Record on flipchart paper*)

SWOT ANALYSIS - 30 minutes

DEFINING

We're going to start by doing a SWOT Analysis of the chapter/provisional chapter. Does anyone know what SWOT stands for?

- Strengths, Weaknesses, Opportunities, and Threats
- A SWOT Analysis allows us to look at our current situation and determine a strategy moving forward.

STRENGTHS

- Let's start with our strengths. Take about three minutes and write down individually three things that you believe we do very well and better than most fraternities on campus.
- After three minutes, ask each person to share their three strengths that they identified.
 - Feel free to ask a few guys to share why they chose a specific strength.
- Our goal is to come to a consensus on three strengths. Now that you've heard what everyone chose, are there any themes you heard that we can all agree on? (*Record on flipchart paper*)

Facilitator note: *If there are more than three that they identify, have them narrow down to three; if there are not three common ones, open up conversation and let the men talk freely as they discuss until they can come to a consensus.*

WEAKNESSES

- Now let's move to weaknesses. Let's do the same thing as before. Take about three minutes to write down individually three things you believe that we struggle with and that we do worse than most fraternities on campus.
- After three minutes, ask each person to share their weaknesses that they identified.
 - Feel free to ask a few guys to share why they chose a specific weakness.
- Our goal is to come to a consensus on three weaknesses. Now that you've heard what everyone chose, are there any themes you heard that we can all agree on? (*Record on flipchart paper*)

Facilitator note: *If there are more than three that they identify, have them narrow down to three; if there are not three common ones, open up conversation and let the men talk freely as they discuss until they can come to a consensus.*

- Which list was harder to come up with -strengths or weaknesses? Why?

OPPORTUNITIES

- Now let's talk about opportunities. Based on the current membership AND strengths we identified, what are the things the chapter can improve upon to do very well AND better than most fraternities on campus?
- Ask officers to shout out some thoughts (*Record on flipchart paper*)
- Once you have a substantial list to choose from, ask the men to discuss and narrow down to the top three.

THREATS

- Let's complete the SWOT Analysis by talking about threats.
- What are the potential barriers to preventing the weaknesses from becoming strengths and the opportunities from becoming realized?
- Ask officers to share thoughts (*Record on flipchart paper*)
- Once you have a substantial list to choose from, ask the men to discuss and narrow down to three.

TRANSITION

- Thank the men for being honest and sharing their thoughts.
- Now that we have this information, what can we do? (*Take a few thoughts*)
- Now that we've identified who are we currently, let's talk about who we want to be.

SHARED VISION - 25 minutes

DEFINING

- Who knows what the vision of Alpha Sigma Phi Fraternity is? (*Take a few thoughts*)
 - The vision is To Better the World through Better Men
- Many businesses and organizations have some type of vision statement. Ours defines what we are striving for as an organization and what we want to be known for.
- Creating a shared vision for the chapter will allow the members (and officers!) to determine what is important to them and what they should prioritize. It will help build consistency and strengthen the motivation behind each of the goals we are going to create today. It will also help us create those goals!

DISCUSSION

- Our shared vision should communicate what we are trying to create within the chapter. It should be easy to understand and not overly complicated!
- To help us create our shared vision, here's a few questions for us to discuss:
 - Why do we exist on campus?
 - What do we want to be known for?
 - How do we benefit the members?
 - How do we benefit the campus community? The local community?

(As the men work through these questions, write down themes on the flipchart paper that you hear)

- What commonalities do we hear? Are we missing anything?
- Given the answers to the questions and the themes written on the flipchart paper, does anyone want to suggest what a shared vision could be? (*Take a few suggestions and encourage conversation until the men can come to a consensus*)

DISPERSE

- Now that we have a shared vision, how can we communicate it? Who's responsible for communicating it?
 - How do we communicate to our members?
 - How do we communicate to our alumni?
 - How do we communicate to our campus community?
- How can we revisit this to assess if we are working towards it? Who's responsible for ensuring that happens? How can we make sure we're working towards this?

GOAL SETTING - 50 minutes

PURPOSE

- Thus far, we've identified what our chapter does well, what we struggle with, our opportunities, and what threatens us. We've also come up with our shared vision on who we want to be. Now it's time to take all of those things and to start to identify our concrete goals.
- As we begin setting goals, there are five criteria to keep in mind:
 - A goal should be measurable. How will the Prudential Board and the chapter know if the goal is achieved?
 - A goal should be achievable with effort. Based on the current officers and membership, is the goal realistic?
 - A goal should be specific so that all officers and members understand the goal. Can you easily explain the goal for the rest of the chapter?
 - A goal should have a time period for accomplishing. When will the goal be achieved?
 - A goal should have a champion. Who is accountable for the goal? Who will keep the goal at the forefront of the Prudential Board and chapter? No brother should be the champion for more than one goal.

GOAL AREAS

- Is anyone familiar with the Chapter Success Model?
 - The Chapter Success Model was developed a few years ago by Alpha Sigma Phi chapter presidents. It was created to outline the five components of a successful chapter.
 - Those components are brotherhood, growth, shared vision, accountability, and a good advisor.
- We've obviously focused on shared vision today. For our goals, let's develop one of our goals around brotherhood, one around growth, and one around accountability.
- Here are a few things for you to think about as you dive into those three areas:
 - Brotherhood- What is the current return on investment (time and money) for members? Why do brothers, primarily in their junior and senior year, go "inactive"? What would juniors and seniors believe a good return on investment would be in exchange for their dues and time?
 - Recruitment- What are our membership standards? How could we better use ChapterBuilder? How can we utilize teams? What does recruitment look like beyond formal recruitment?
 - Accountability- What type of informal accountability do we have within the chapter? Are we utilizing the Standards Board to the best of our ability?
- Let's do two more (for a total of five). Let's ensure that we focus one on a weakness we identified or one on an opportunity, as well as one that will help the chapter achieve its shared vision. *(If their shared vision is covered in one of the previous five areas, they can focus on a weakness and an opportunity)*

GOAL SETTING

- For the creation of the goals, let's have two officers pair up and tackle one of the goal areas. If a goal area aligns with your officer position (e.g., brotherhood and Vice President of Retention), let's make sure you're in that pairing.
- Each pair will have 10 minutes to come up with their goal. Ensure your goal meets all five criteria and you'll need to identify the goal, who will champion it, and when it will be completed. After ten minutes, ask each pair to share. After each goal is shared, ask the officers if there is anything they want to change about the goal before it's finalized. Once it's considered finalized, the Vice President of Communications should put it in the Goal Setting Guide.

COMMUNICATION PLAN

- Now that we have our goals, let's talk about our communication plan.
- How will we communicate our goals to the chapter membership? Who is responsible?
- How will we communicate our goals to our Chapter Council and Grand Chapter Advisor? Who is responsible? How can they help us achieve these goals?
- How will we communicate our goals to our Fraternity/Sorority Advisor? Who is responsible? How can they help us achieve these goals?

WRAPPING UP - 5 minutes

- Thank you for being here and I'm proud of the work you've done today! I really believe the work you've done can set up your chapter/provisional chapter for a very successful year!
- My challenge to you is to commit to revisiting these on a regular basis. Making goals are the easy part. Revisiting them and working towards them are the hard part. Don't let today be wasted. Commit to revisiting these 1-2 times a month in your Prudential Board meetings and being honest about what needs to happen to achieve these goals. If I can help in any way, please let me know!