



## **CANDIDATE / CHAPTER RETREATS**

This resource can be used as a primer for chapter officers seeking more information on retreats, their purpose, and how to successfully implement them. It can also be used as a guide for facilitating conversation within and buy-in from the chapter. To use this resource as a facilitation guide, please pay attention to the questions and statements that have been *italicized*. These items will allow you to solicit information from chapter members or structure your meeting as you move through the planning process for an upcoming retreat. The bullet points that follow the italicized talking points provide additional information and confirm best practices.

### **THE BENEFITS OF RETREATS**

- *What do you think are the benefits of a chapter retreat?*
  - Brotherhood – time together without non-members present.
  - Time away from the everyday rigors of student life.
  - An opportunity to focus on challenges and issues facing the chapter.
  - A time and space for goal setting and team building.
- *Why are these things important?*
  - A fraternity is a brotherhood AND a business. Sometimes it can be difficult to separate the two, or it can be too easy to focus on one and not the other.
  - Retreats provide an opportunity to get the chapter back on track, whether that is by having fun and furthering the bonds of brotherhood, or if that is through addressing the challenges that face the chapter as a small business.

### **HOW TO ORGANIZE AN EFFECTIVE RETREAT**

- *First and foremost, what **kind of retreat** is NEEDED?*
  - Fun, relaxed and focused on brotherhood?
  - Business-like and focused on addressing tough issues?
- *Second, determine **when** the retreat will take place.*
  - Determine who the retreat is for – The chapter; The Executive Board; a specific committee; another group?
  - Establish a date that works for the majority of those members expected to attend, if a date cannot be determined that works for everybody.
  - Announce the date(s) and the expectation that all relevant members be in attendance.
- *Third, determine the **objectives** of the retreat*
  - Don't try to do too much because the members will likely feel over-programmed.
  - Remember the acronym – K.I.S.S. (Keep It Simply Structured)
  - Even if the focus of the retreat is to address tough issues, make sure that you also incorporate some “fun time” in the objectives and the agenda.
- *Fourth, determine **where** the retreat will take place*
  - Try to get away from the chapter house and the university/college if you can.
    - Likely this will mean having to spend some money, but a campground or retreat center can usually be found at reasonable prices – search the internet for retreat centers and the like in your area.
  - If you can't “get away” from campus, then reserve a large meeting space/room on campus away from the chapter house.



- Getting away from the chapter house will help chapter members be less distracted.
- *Fifth, set the agenda*
  - At this point, you should have established who, when, where, and why for the retreat, now it is time to establish the specifics of what will be covered at the retreat.
  - Just like with establishing the objectives, don't try to do too much in the agenda.
  - For **“brotherhood”** (i.e. fun):
    - What do the members enjoy doing?
    - Focus on things that do not involve alcohol – remember, the point of this type of retreat is to further build brotherhood bonds and to get away from the “everyday” life of being a college student and fraternity member. Additionally, even for members who are of legal drinking age, alcohol often distracts from the purpose of the retreat.
    - Hype up the event – be excited and others will get excited
    - NO FEAR! – Don't be afraid to do something different that the members haven't done before.
    - Encourage each other – all retreat participants should be expected to be supportive and encouraging of one another.
    - Plenty of snacks and non-alcoholic drinks.
    - Make Connections – after the events, in casual conversation, make connections about things that occurred (i.e. behavior, how the experience relates, what can be taken back to the chapter) that make effective examples of behavior in the chapter (good and bad); the key here is to bring these up casually and by asking the right questions.
  - For **“business”** (i.e. addressing tough issues, planning):
    - Be specific! – What is the real issue that needs to be resolved?
    - NO FEAR! – No topic is off limits to go on the agenda and, therefore, for discussion
    - Establish an environment of respect – all retreat participants must be made to feel safe in that their opinions will be heard and that they are not “attacked” just because someone disagrees with their idea, nor should they “attack” anyone else if they do not agree with their idea(s).
    - Have a plan – take time to plan out “HOW” you want to address the issues on the agenda.
    - Use Your Resources –such as ideas/information from the Fraternity and Sorority Life Office or Alumni.
    - Incorporate some fun into the agenda – schedule some “fun time” AND incorporate activities (teambuilding activities) into the various agenda items.
    - Be flexible in the timing – make sure you give yourself plenty of time to address each issue on the agenda, but be flexible. If you need to spend some more time on a particular issue than originally planned, then do it, but don't spend so much time that the members “shut down” on the issue.
    - GET RESOLUTION – For each item on the agenda, you MUST get to some form of resolution.
      - Resolution equals energy and a clear path moving forward. Avoid the fog.



**FIGURING OUT HOW TO ADDRESS THE TOUGH ISSUES**

- *First, what are the tough issues?*
  - Have to be able to identify these before you can effectively address them
  - When determining what the tough issues are, keep in mind that the first thing that comes to mind might not be the “real” issue.
    - Sometimes the issues that we feel are challenging us are really just the byproduct of a simpler, but more root problem.
    - **EXAMPLE** – Apathetic members: Is it that members are truly unmotivated or is it that the chapter is recruiting the wrong men? The answer could be both, but by focusing on the recruitment issue, with the buy-in of the membership, both problems can, to a degree, be fixed.
- *Figure out “HOW” you’re going to address the issues.*
  - Be prepared for everyone to be uncomfortable with addressing some, if not all, of these issues.
  - Be prepared for conflict amongst the members – Not everyone is going to see eye-to-eye on how to resolve the tough issues.
  - Prepare yourself and the members to be constructive in their critiques and to be civil in their behavior towards one another.
- **\*\*\*Potential Addressing Tough Issues Activity.**
  - Brainstorm – solicit every idea you can as a possible solution, no matter how “left field” it may seem from the members.
  - Clarification – whomever offered an idea on a solution, have them clarify their idea to ensure that everyone understands (this is not the time for argument or discussion, just clarification).
  - Discussion – now that everyone understands, have each member take a moment to write down what they like and dislike about each of the suggested ideas.
    - Tape a brown bag under each idea and have the members drop their likes/dislikes into the bags.
    - Give the group a break and write down each of the likes/dislikes for each idea.
    - Upon returning, go through each idea and have the membership discuss the idea with the likes/dislikes and determine if the idea is “feasible” or “not feasible.”
    - If it’s “not feasible” then cross it off.
  - Vote – once the list of ideas is narrowed down to just the “feasible” ideas, have the members vote on the idea/plan they like the best.
    - Again, you can use the brown bag method to do the voting.
    - Have Executive Board members, at a chapter retreat, not vote and in the event of a tie, the Executive Board would then cast their votes to make a determination between the top two/three ideas.
    - EVERY member MUST have the understanding that whatever idea/plan is determined to be used through the voting WILL be supported by ALL members – the membership should agree to this prior to voting.
    - Once the idea is determined, the membership needs to determine the detailed steps of the plan/idea to be implemented.



- This could be done through small groups each developing a plan and reporting back to the larger group, OR the defining of the details of the plan could be given to the relevant officer/committee to establish the specifics and then reported to the chapter at a later date.

### **ENSURING THAT MEMBERS COME AWAY REENERGIZED**

- No matter what type of retreat you are conducting, the members MUST have fun.
- Come to a resolution.
  - There has to be a result for each agenda item.
  - Resolution equals a sense of accomplishment; A sense of accomplishment equals positive thinking; Positive thinking equals positive energy and desire; Positive energy and desire equals action; Action equals progress; Progress equals success; THEREFORE, resolution equals success.
- Be organized but be flexible.
  - This is a retreat, not a military exercise.
  - Have a plan, but be prepared to deviate from the plan when it is absolutely necessary.

### **CONCLUSION: MAKE A PLAN**

*Whether you used this resource as an information primer or as a facilitated guide, you should now be in a position to put pen to paper and draft your plan for your retreat.*

- *What kind of retreat is needed?*
  - Brotherhood, officer transition, candidate class, goal setting, etc.?
- *When should the retreat be held?*
  - Before the semester/quarter begins, during a fall/spring break, over a long weekend, just for an afternoon or evening?
- *What needs to be accomplished at the retreat?*
  - Objectives to achieve.
- *Where could the retreat be held?*
  - On-campus, off-campus, retreat center, outdoor adventure facility?
- *Set a rough agenda.*
  - Map out a schedule for the event and what could be covered.
    - What needs to happen between now and then (reservations, supplies, facilitators, etc.)?
    - Who would be good to lead each portion of the retreat (advisor, other facilitator, officer, member)?



**ADDITIONAL RESOURCES**

- Your Leadership Consultant
- Chapter Advisor/Alumni Advisory Board
- Office of Student Life/Fraternity and Sorority Life Office
- Student Recreation Center or a Local Ropes/Challenge Course
- Books/Articles
  - *Solving Tough Problems: An Open Way of Talking, Listening, and Creating New Realities*
  - *How Great Decisions Get Made: 10 Easy Steps for Reaching Agreement on Even the Toughest Issues*
  - *Joe Torre's Ground Rules for Winners: 12 Keys to Managing Team Players, Tough Bosses, Setbacks*
  - *Crucial Conversations: Tools for Talking When Stakes are High*
- Web Resources
  - [A Guide to Planning and Conducting Successful Retreats \(University of South Carolina\)](#)
  - [Sample Retreat Agenda \(Best Practices Library\)](#)
  - [Sample Retreat Agenda \(Best Practices Library\)](#)