



**DELTA CHI**  
FRATERNITY

## Officer Retreats

# Officer Retreat Planning Guide

An officer transition retreat will help the continuation of Delta Chi leadership. Chapters and colonies will lean on the legacy of their predecessors to forge an even stronger member experience. An officer transition retreat should be organized and facilitated by the incoming and outgoing chapter “A” and “B” and supported by the Alumni Board of Trustees (ABT). A general officer retreat or mid-year retreat should be organized by the current “A” and “B” and supported by the ABT. This retreat guide is to help the executive board create a cohesive leadership philosophy while understanding their responsibilities to ensure a successful term.



### Setting Objectives

Setting objectives for your retreat can structure your agenda, provide purpose to your conversations, and assist you in measuring the effectiveness of your retreat. Some potential objectives include:

#### Objectives (Transition Retreat)

- Individual incoming officers will transition with outgoing officers
- The new executive board will be educated on Delta Chi’s policies and procedures
- The outgoing executive board will educate the incoming executive board on their successes, strategic initiatives, and their experience over the past year
- Incoming officers will get to know their ABT counterpart, ABT expectations, and how to best work with their ABT

#### Objectives (General Officer Retreat)

- The executive board will establish 5-7 goals for the term ahead
- The executive board will assess progress on previously established goals
- Individual officers will develop an action plan to assist in achieving goals set by the executive board
- Individual officers will meet with their ABT counterpart to discuss how they can best support one another in achieving goals and action items in the coming term

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## Before the Retreat

### Scheduling the event:

Figure out a time that works best for everyone to maximize participation. You can use a tool like [Doodle](#) or [SignUpGenius](#) to easily find out when brothers are available and select the best option for your retreat.

### Book the meeting space:

If your retreat will be in person, it is important to secure your location/space. Be sure the location incorporates all your needs, including adequate space for participants, accessibility measures, technology needs, etc. Be mindful if the location will require transportation, and how your participants will get to the event. Remember that any in-person event also needs to comply with the health and safety guidelines from your campus, as well as any guidelines provided by the local and state governments.

### Send out invitations:

As you communicate details about the event, be mindful that your communication includes all the important details (date, time, location, materials to bring, general expectations, etc). Make sure you invite all participants, whether that's through a calendar invite, text, GroupMe, email or another method. It's best to over-communicate expectations and details, especially if your retreat will be hosted virtually, so that attendees remember them.

### Take the officer onboarding course (Transition Retreat Only):

Before participating in the retreat, all executive board members should complete their [officer onboarding course](#) from Delta Chi. This short online training is designed to help officers understand their responsibilities and strategies for success. If you have not received your course invitation for the post-tests, please contact the Director of Education and Leadership Programs ([abrown@deltachi.org](mailto:abrown@deltachi.org)) to get access.

### Know your resources:

There are a number resources available to members on the [Officer Resources](#) page. Retreat participants should be familiar with these resources, and be prepared for discussions during the program.





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## Final preparation:

As your retreat approaches, be sure that you have all the materials you need to host the retreat. Whether you're hosting virtually or in person, be mindful of the space and structure of the program, and how that can impact your participants. For in person events, take a few moments to reconfigure the room or as necessary. For virtual events, think through your activities and engagement opportunities. Both elements are important to ensure that your time together is conducive to an interactive environment.

## Material Suggestions:

- Flipchart paper
- Markers
- Pens
- Printed materials (agendas, copies of resources, transition meeting guides, etc.)
- Sticky notes
- Laptop, Tablet, or any technology needed
- Snacks
- Hand sanitizer/cleaning products
- Virtual platform access and links

*\*Note: If using campus facilities or retreat space, be mindful of any restrictions and be sure to return the room to its original state.*



## After the Retreat

### Thank participants:

Executive board members, alumni, and volunteers gave their time and attention to participate in this program. Take time to show your appreciation, and highlight how their investment will yield positive results for members and the organization.

### Assess your impact:

Each chapter should take time to assess the impact of the retreat to see what can be improved for future programs. You can create a survey to share with participants to gain an understanding of what they liked, what can be improved, and if they feel the retreat objectives were met.

### Follow-Up:

A significant portion of a retreat is centered around goal setting and establishing priorities. It is important to revisit these goals, determine your progress, and find ways to achieve or modify your objectives. You can use your executive board or chapter meetings to check in, and determine if you need to refocus your efforts. This is also a great opportunity to engage the support of your Chapter Coach.



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## Sample Officer Retreat Guide

This sample retreat guide is meant to provide an overview and direction for your event to help organizers facilitate a successful program. This can be adapted to meet the needs and timeframe for your organization.

### Sample Agenda

- Welcome & Introduction – 10 minutes
- Team Building Activity – 20 minutes
- Officer Transition Meetings (Transition Retreat Only) - 60 minutes
- ABT Collaboration – 45 minutes
- Break – 15 minutes
- Understanding Our Purpose – 30 minutes
- Goal Setting – 45 minutes
- Wrap-Up – 30 minutes



### Other potential topics could include:

- Strategic planning
- Effective communication
- Leadership development
- Conflict resolution
- Diversity, equity, and inclusion
- Recruitment strategies
- Improving brotherhood
- Organizational culture



## Sample Retreat Facilitation

### Welcome and Introduction-10 minutes

This is your chance to set the tone, and help participants feel welcomed and excited about the activities for the day. Your attitude and approach will go a long way in laying the foundation for the work to be accomplished. Some topics to include in your opening may include:

- Introductions (this may be a new officer's first time meeting an ABT member)
- Overview of the schedule
- Expectations of the participants
- Objectives/takeaways for the retreat
- Any rules/restrictions related to the location/space of the retreat



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## Team Building Activities-20 minutes

While your officers and members know each other, finding ways to work with one another can be a different experience. Taking time to begin with team building activities can help highlight how your group can work successfully with one another. Below are a few sample activities that you can use. Please note that someone will need to serve as a facilitator for these activities, as there are processing questions following each activity that assist participants in drawing connections between the activity, and real-life experiences.

## Officer Transition Meetings (Transition Retreat Only)- 60 minutes

An important part of an officer transition meeting is the chance for the incoming and outgoing officers to meet and discuss the work of that position. Participants should have a copy of the position description, as well as any examples or materials to be passed along. Topics for them to discuss include:

- Overview of the responsibilities of the position
- Review of resources for the position, including BRIEFS, bylaws, policies, and Delta Chi Law
- Create a timeline for completion of duties, using the [60 Day Checklist](#) as a reference.
- Discuss unfinished projects or action plans from outgoing officer
- Share advice and lessons learned

## Break-15 minutes



## ABT Collaboration- 45 minutes

As officers in your chapter, you are not alone in your efforts to support your members and chapter. Identifying stakeholders (like alumni, volunteers, campus advisors, and IHQ staff) can help members feel prepared and supported as they begin their work. Inviting the ABT to participate in your retreat can improve communication, establish expectations, and foster collaborative working relationships.

It is important for participants to understand what expectations the collegiate members and ABT members have for one another. The facilitator should start by asking the collegiate members questions like:

- What do you expect from the ABT in order to be effective?
- How do you envision the ABT being involved?
- What does effective communication look like between you and the ABT?

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Once the collegiate members have answered, the ABT should have the opportunity to share their thoughts on the same questions. It is important to note the similarities and differences between the responses. The differences become the opportunity to have conversations on what both groups can do to reach a consensus regarding support.

Provide opportunities for the collegiate members to meet and work with their ABT counterpart. If the full ABT is unable to be present, or not all ABT positions are filled, you can pair several collegiate members with an ABT member.

## Understanding Our Purpose-30 minutes

Delta Chis are called to live out our values. As a chapter, it is important to know who you are and what you stand for. It can be useful to take stock of the programs and events you host, your reputation on campus, and how the actions of the members reflect on the organization. One way to help your participants examine this is by listing out the values of Delta Chi, and asking the participants to come up with a list of all the events, programs, and ways that the chapter and members live out our values.

- Facilitator Notes:
  - What was easy/challenging about this activity?
  - What does this list say about our organization? If we were to ask others about how Delta Chi lives our values, what could they tell us?
  - What are some ways we can improve moving forward?



## Goal Setting- 45 minutes

Setting goals is an important part of a successful team. Goals can help provide a sense of direction, support new or positive behaviors, and help people focus on the task at hand. You can help your team set goals by asking questions like:

- What are you hoping to accomplish?
- How can you make the organization better through your efforts?
- Who can you collaborate with to achieve your goals?
- How will you know you have accomplished your goals?

## (Mid-Year Retreat Only)

- What have you accomplished this far?
- What would you have done differently?
- What goals did we not achieve and how can we make it happen this next term?



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As you have conversations with your team, encourage them to approach goal setting using SMART goals. SMART stands for: Specific, Measurable, Attainable, Realistic, Timely.

Take time for everyone to share their goals, and be sure to keep a record of these goals and how they fit together. This will be a useful opportunity to revisit at a later date, and see how things are moving forward. Pay special attention to those goals that require the collaboration of multiple officers, members, or stakeholders.

## Wrap Up- 30 minutes

As you conclude your retreat, it is important to spend time reviewing what was accomplished, highlighting any goals or action items, and identifying next steps to build upon your momentum. Consider a wrap up activity like Pass the Gavel, or asking participants to share one thing that they learned, and one thing they commit to doing as a result of the retreat. Asking participants to write these statements down also gives you something to revisit in the weeks and months to come as you examine your progress. Thank everyone again for their time, and tell them how you're looking forward to working with them through the semester ahead.



## Officer Retreat FAQs

### Why have an officer retreat?

An officer retreat is an important opportunity to create a plan to guide the semester and the year ahead. This allows officers to connect with one another, create a united leadership philosophy, and work together to positively support and move the Fraternity forward through goal setting and progress assessment.

### Who should attend officer retreats?

All incoming and outgoing executive board members and chairs, as well as the Alumni Board of Trustees. At times, the executive board may deem it necessary to meet as a collective without all chairmen involved. This is acceptable; however, it is important to remember that advisors should still be included, and the retreat should have clear and reportable takeaways that can be communicated to chairmen and members.



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## **When should an officer retreat be held?**

There are two types of retreats: an officer transition retreat and a general officer retreat. An officer transition retreat should be held after the election of new officers or at the start of the new officer term, as well as mid-officer term. Many chapters/colonies will host an officer retreat during the summer months to prepare for the fall semester/quarter and check-in on goals and progress since their officer terms began.

## **Where should the officer retreat take place?**

The retreat should take place somewhere with enough space to accommodate all attendees, one-on-one meetings, and small breakouts. A space on campus will likely be the easiest and most cost-effective option. Some chapters/colonies will host summer retreats at their chapter facility, retreat center, or other appropriate location. When possible, it may be helpful to host a retreat away from the house or campus to minimize distractions and to allow members to fully engage and get away.

When gathering in person is not an option, virtual retreats provide a unique opportunity for engagement and connection. Using a virtual platform like Zoom can still provide members, alumni, and volunteers the chance to meet and host a productive retreat for all participants.

## **Who should facilitate the officer transition retreat?**

The officer retreat should be facilitated by the Chapter “A” and/or “B”. An agenda should be created that allows for all officers to have a facilitation role for the retreat. ABT members should play a supporting role in the retreat. Their primary role is to support the chapter leadership, develop relationships, approve the operating budget, and help guide strategic planning.

## **How would we have the retreat virtually?**

A virtual retreat can still offer the same benefits and opportunities as an in person retreat. You will need to modify your approach to help achieve your goal. This may include adjusting activities or discussion, or adjusting your schedule to allow for some additional breaks away from screens. You can use the [Hosting A Virtual Retreat guide](#) <insert link> to help you plan your event.

## **How do we go about planning the retreat?**

Planning an effective retreat takes time and forethought. This can be done by working alongside your executive board, asking for assistance from stakeholders (“BB”, ABT, IHQ chapter coach, Campus Fraternity/Sorority Advisor, etc), and focusing on your purpose. Start by identifying a date, location, and crafting your agenda to achieve your desired outcomes.







## Team Building Examples

### Birthday Line

- The objective of this activity is to have all the participants get in line based on their birthday without talking. The line begins on one end with January 1st and ending with December 31st. Once the group has lined up, each participant can share their birthday to see if they were successful. (For virtual delivery, participants would work to give themselves a number instead of standing in line. For example, a Jan 18th birthday would be 1, Feb 4th would be 2, etc. Another restriction would be that participants cannot use the chat feature to make things more challenging).
- Facilitator Questions:
  - How difficult was this activity? How did you achieve your objective?
  - How does this relate to your work as an officer in the chapter?
  - How would this activity be different if we tried it with the whole organization?
  - How can you work to be sure your message is received and understood?
- Takeaway: Communication is an essential part of your work as leaders. You may need to adjust your communication style to ensure that your message is understood, projects are completed, and goals are met.



### Higher/Lower

- This activity requires a set of dice, or the use of a random number generator set for a minimum of 1 and a maximum of 12. The first player rolls the dice (or if being done virtually, the facilitator will use the random number generator). The next player guesses if they will roll a number higher or lower than the person before them (they cannot guess they will roll the same). The player rolls the dice/clicks the random number generator, and if they are correct receive a point. Each player should keep track of their own score. Keep going through all the participants. Set a time and continue until time is up (3-5 minutes based on the size of your group).
- Facilitator Questions:
  - What strategies did you use to make your guess?
  - How did you feel when others received a point and you didn't?
  - How is this similar to situations we may face as leaders in the organization?
- Takeaway: As a leader, there will be situations that are out of our control. Our goal should be to be critical thinkers, analyze the information we have, and be thoughtful in how we approach our work.





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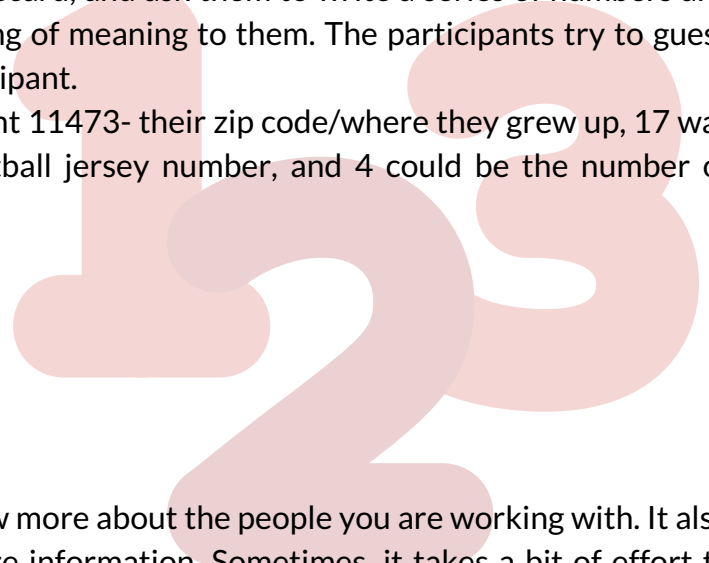
## Desert Island

- Your group has been stranded out on the ocean, and your life raft has sprung a leak. Luckily, you spot an island! As your group swims to safety, you can only grab three items to help aid in your survival. You must determine, as a group, which three items you will take. Depending on the size of the group, you can also consider splitting into two teams. Your options are:
  - A container of waterproof matches
  - A notebook and pen
  - 100ft of rope
  - A pocket knife
  - A bucket
  - A 10ft x 10 ft section of tarp
  - A potato
  - A mirror
  - A revolver (no ammunition)
- Facilitator Questions:
  - How easy was it to select your items?
  - How did you make decisions within the group?
  - How did you handle disagreements?
- Takeaway: Each of us brings different viewpoints and experiences to our work. It is important to find ways to listen to one another, as well as finding ways to compromise or make decisions. Disagreements will be a part of your work: identifying ways to handle them appropriately can help your organization find success.



## ID Numbers

- Ask participants to take a piece of paper or notecard, and ask them to write a series of numbers and letters on that sheet, which represent something of meaning to them. The participants try to guess what the numbers and letters mean to the participant.
  - For example: 11473-17-33-4 could represent 11473- their zip code/where they grew up, 17 was their graduation year, 33 was their basketball jersey number, and 4 could be the number of siblings.
- Facilitator Questions:
  - How easy was it to decipher the messages?
  - What did you learn about each other?
  - What surprised you?
- Takeaway: This provides a chance to get to know more about the people you are working with. It also highlights that there are different ways to share information. Sometimes, it takes a bit of effort to decipher and understand the information that others are sharing with us.



*\*You can find other examples of team builders online, or by reaching out to Delta Chi's Director of Education and Leadership Programs, Alex Brown ([abrown@deltachi.org](mailto:abrown@deltachi.org)).*