



RETREAT MANUAL

CHAPTER OFFICER RESOURCES



PHI DELTA THETA
Become the greatest version of yourself

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INTRODUCTION

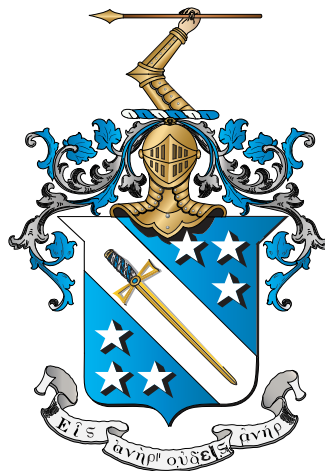
WELCOME BROTHER VICE PRESIDENT

The word retreat, used in the context of a chapter activity, refers to withdrawing from the normal scene for the purpose of reflection and evaluation, as well as to give chapter members the opportunity to recharge, contemplate, bond, and renew. In the case of fraternity operations, retreats are not only associated with chapter success, but they are more than likely the cause of it. Retreats give the brothers an opportunity to take a step back to assess the chapter and make plans to guide the chapter through the upcoming months. They are also a time for members to brainstorm ideas, express concerns, provide praise, and appreciate the Cardinal Principles in an informal environment.

In order to be a productive and successful, all organizations must take time to evaluate their position, set goals and objectives, and generally decide its course for the future. Some of the basic goals of retreats are to:

- Promote brotherhood and a sense of community
- Resolve problems and conflict
- Give brothers an opportunity to reflect on the purpose of the Fraternity
- Set goals and objectives to improve chapter operations
- Give each member a chance to share their thoughts and ideas
- Renew the brothers' commitment to the Fraternity

The purpose of this manual is to suggest chapter ideas and to provide you with helpful tips to plan, implement, and evaluate a successful retreat. In this guide, you will find a section on retreat planning, common retreats, and expected results. In order to conduct a successful retreat, it would be beneficial to utilize the resources provided in this manual. The evaluation guides included will assist you in developing the best possible retreat to meet the needs of your chapter. To ensure success in planning the retreat, please confer not only with the manual, but the officer manual as well in order to gain more insight.



SECTION 1

I BELIEVE AND THE PHIKEIA OATH

I BELIEVE

I believe in the college fraternity, creator of friendships.

I believe in its quick sympathies, and its helping hand.

I believe in its brave idealism, stirring every valiant emotion, rousing every potential talent.

I believe in its compelling drive for sound scholarship, for genuine culture, for clear-eyed honesty, for business integrity.

I believe in the college fraternity, maker of men.

—Arthur R. Priest, Executive Secretary

Phi Delta Theta Fraternity, 1921–1937

THE PHIKEIA OATH

"I, (full name), now declare that I pledge myself and my services to the Phi Delta Theta Fraternity, that I will discharge faith-fully the duties devolving upon me as a Phikeia, that I will try to promote the welfare of the Fraternity, and that I will be always mindful of the basic principles of the Fraternity. And further, I pledge myself as a college man to uphold the honor and dignity of Phi Delta Theta, everywhere and at all times. I will never bring disgrace to this, my Fraternity, by any act of dishonesty or moral cowardice. I will stand firm for the ideals and sacred things of my Fraternity, both alone and with my Phikeia brothers. I will revere and obey the laws of the Fraternity, and do my best to incite a like respect and reverence in my Phikeia brothers and in every member of this chapter. I will strive in all ways to transmit the Fraternity to those who may follow after, not only, not less, but greater than it was transmitted to me."

SECTION 2

OUTLINE FOR CHAPTER RETREATS

2.1 THE RETREAT CYCLE FROM START TO FINISH

Conducting a retreat can be compared to organizing a social event. In order to have a successful social event, certain guidelines must be followed. Likewise, in order to have a successful retreat, a list of steps should be employed. The steps below will provide you with a guide to a successful retreat and ensure that the retreat will be a positive experience for everyone involved. Keep in mind that some of the steps will take longer than the others, but in the end, you will have conducted a retreat that will ultimately lead to a successful chapter.

Step 1: Assessing the needs of the chapter

It is important to remember that retreats must begin with a specific goal or objective. In order to define the specific goal or objective for a retreat, an informal assessment of the chapter should be conducted. A chapter that has critically and correctly analyzed its present performance or position is well on their way to becoming a more successful organization. This can be accomplished by personally observing chapter operations and taking the time to complete one of the evaluation forms throughout this manual.

An informal assessment can help you answer questions, such as:

- Does the chapter need a membership recruitment workshop?
- Does the chapter need direction in its daily operations?
- Do the brothers need a time for everyone to get together, separate from chapter meetings?

Step 2: Deciding on the retreat

Once you have conducted an informal assessment of the chapter and solicited suggestions from your brothers, the first step in planning the retreat is to decide on the specific goal(s) and/or objective(s) of the retreat. Two questions to ask yourself are: What do you want to accomplish? Where should the chapter be when this retreat is completed? Once again, the evaluations included in this manual will aid you in deciding on the specific retreat for your chapter.

After deciding on what type of retreat to conduct, the next step in the decision process is to consider the following issues:

- Choose and announce the retreat date at least three weeks ahead of time. Ask brothers to plan around that date.
- Make sure that you plan the retreat with your goals and objectives in mind, so that you will have enough time for fellowship, meetings, and recreation. Two-thirds to three-fourths of the total retreat time should be meeting time.
- Encourage all brothers to attend because the more brothers in attendance the better. Some chapters even make attendance mandatory.
- Think of helpful resources such as your chapter advisory board chairman, province president, leadership consultant, or fraternity advisor and consider inviting them to attend the retreat and serve as group facilitators.
- Find a retreat location that allows the brothers to leave the chapter house and has places for small discussion groups. Check if the college has a retreat facility available to campus groups at low or no cost.
- Create a [budget](#) and check with the Treasurer to confirm that there are monetary resources available for supplies and accommodations. Most retreats can be done with limited funds.

Step 3 : Planning the retreat

Once you have decided on the logistics of the retreat, it is time to start planning the actual retreat. It would be helpful to create a retreat checklist that you can refer to throughout the planning process. Here are some guidelines to further help you in the planning process:

- Involve as many brothers as possible in the planning process by forming a retreat committee. This will help motivate brothers to attend the retreat because they have helped plan it.
- Have committee members be in charge of logistical issues, such as calling facilitators and presenters, preparing meals, and suggesting recreational activities.
- Gather all necessary materials such as paper, pens and pencils, and a calendar.
- Develop an agenda for the retreat.
- Invite group facilitators to the retreat. Make sure to arrange for their audiovisual needs, accommodations, food, and transportation.
- Create a fun and positive activity to end the retreat.

Step 4: Planning

Once you have planned the retreat with the retreat committee, it is time to bring the chapter together. It might be helpful to make up a checklist and review it often throughout the planning and implementation processes. These are to serve as general guidelines to help you successfully implement the retreat:

- Confirm your arrangements. Make sure that prepare for refreshments, recreational activities, meals, lodging, supplies, transportation (for brothers and speakers), and any equipment (i.e. tables, chairs, lecterns, TV) that may be needed for the retreat, as well as for the retreat location to be cleaned after the retreat.
- Give the necessary information about the retreat to chapter members, including directions to the retreat location, the retreat agenda, and emergency contact information.
- Call chapter members and remind them about the retreat one week prior to the retreat. If you have a speaker attending the retreat, confirm their attendance, accommodations, audio-visual needs, and transportation one week ahead of time as well.
- Have everyone meet at a central location and go to the retreat together to ensure that everyone has a ride to the retreat location.
- Allow adequate time for brothers to get settled in, if the retreat lasts overnight.
- Start the retreat with a discussion about “why are we here?” and then continue with the planned agenda.

Step 5 : Evaluation

Once the retreat is over, it is important to evaluate the retreat in order to determine the strengths and weaknesses. After all of your work, it is important to know whether or not all of the planning met your original retreat goals. It is vital to bring the retreat cycle to its completion and determine whether or not the retreat addressed the needs of the chapter. All of this feedback will be useful in planning your next retreat and help your chapter to grow. Here are some suggestions to consider after the closing of the retreat:

- Solicit everyone’s opinion as to how the retreat itself went.
- Develop an evaluation prior to the retreat that asks for feedback on the group activities, facilitators, recreational activities, the agenda, accommodations, and the food.
- Close the retreat with a discussion about whether or not the retreat goals and objectives were accomplished.
- Review the initial question of “why are we here?”

Step 6: Follow up

After you have completed the evaluation, it is also necessary to conduct some sort of follow-up on the retreat to ensure that the goals and objectives developed at the retreat are actually met. Here are some suggestions on how to help your chapter to continue growing:

- Make the goals publicly known, along with specific assignments for accomplishing the goals and due dates by typing up the list of goals and posting them in a place for all to see.
- Send a copy of the goals to all brothers who were unable to attend the retreat, alumni, and Greek advisor.
- Review goals regularly, encourage officers to give monthly progress reports, and mark off the goals as they are accomplished.
- Reward and thank all of those involved, which includes writing thank-you notes to those who cooked, guest speakers, advisors, and brothers. If each individual is rewarded for their efforts at the retreat, they will most likely be more motivated to help out with the next retreat.

2.2 HELPFUL HINTS FOR RETREAT ORGANIZERS

Try to have a retreat every semester that includes all chapter members, gives everyone the opportunity to give input, and allows brothers to leave campus distractions behind.

- Inform brothers about the purpose, date, and location of the retreat and supply them with an agenda prior to the retreat date.
- Plan the retreat for a weekend possibly after elections, the beginning of the semester, or before recruitment.
- Promote the retreat in a positive manner and keep your enthusiasm high.
- Confirm all arrangements for refreshments/meals, recreational facilities, transportation, accommodations, and equipment needs (i.e. AV equipment, tables, chairs) the day before the retreat.
- Prepare an agenda ahead of time and make sure to include structured recreational time. If needed, be flexible with the schedule.
- Involve as many brothers in the planning process as possible. This will help the brothers feel a sense of ownership.
- Start the retreat by discussing “Why are we here?” This will help brothers focus on the purpose of the retreat.
- Space breaks between each long presentation, so that brothers have time to collect their thoughts. If brothers seem frustrated, tired, or bored, implement a quick teambuilder to rejuvenate them.
- Constantly thank brothers for their participation in the retreat. This will ensure high morale and positive attitudes throughout the retreat.
- End the retreat by summarizing the discussions, sharing the goals and objectives set forth as a result of the retreat.

Helpful retreat tips:

Bonding with alcohol detracts from the real purpose of the retreat. This gathering needs to be an intensive session geared toward the values of the Fraternity and goal setting for the chapter. By bringing alcohol into the setting it can only serve as a detractor and take away from the focus of the retreat.

1. Keep the event, light-hearted and action packed, but remain focused at all times. Schedule breaks and provide stimulating activities in between sessions.
2. Be sure that the timing of the retreat doesn't interfere with major chapter activities (recruitment, alumni events, etc.) or academic deadlines (midterms, finals, etc.).
3. Prepare an evaluation form for all attendants to complete, giving their thoughts on the effectiveness of the retreat, and what they will take away from it.

2.3 RETREAT WORKSHEET

This is a simple worksheet that can be used in planning the next retreat.

Assess the needs of the chapter. You may use the Chapter Evaluation Form in Appendix B.

Type of retreat: _____

Date(s): _____

Location: _____

Committee members: _____

Goals and objectives of the retreat: _____

Planning the retreat:

Task	Assigned To	Accomplished
_____	_____	_____

Budget:

Item	Cost
_____	_____

SECTION 3

SAMPLE RETREAT SCHEDULE

FRIDAY

- Arrive and unpack
- Discussion: purpose of the retreat
- Dinner
- Discussion: brotherhood in the chapter
 - Open and unstructured
 - Songs and games
 - Read *The Bond*

SATURDAY

- Breakfast
- Icebreaker
- Group discussion: issues and problems facing the chapter
- Evaluate issues and problems in small groups
 - Discuss proposals and strategies for addressing issues and problems in form of goals
 - Establish deadlines for the achievement of goals
- Lunch
- Present proposals and strategies to the chapter
- Executive Committee discussion
 - Future outlook/goals and objectives
 - Chapter finances
 - Housing
- Design a chapter calendar outlining important events (i.e. social functions, community service, Phikeia activities, alumni events, future retreats, etc.)
- Review university and General Fraternity policies and procedures
 - Dates and deadlines
 - Proper forms
- Prepare for dinner
- Dinner.
- Review committee structure, membership, responsibilities and purpose
- Free time
- Campfire discussion

SUNDAY

- Breakfast
- Chapter bylaw review
 - Proposed revisions
 - Streamlining/clarifying sections
- Discuss job descriptions and responsibilities of each officer
- Lunch
- Prepare for departure

3.1 HOW TO LEAD A BRAINSTORMING DISCUSSION

Brainstorming sessions are primarily used to solicit participation from the entire group and help the chapter gain a better representation of ideas. You can obtain an abundance of ideas by establishing a non-judgmental environment beforehand.

Through this process, the group may be able to agree on an idea. The steps are listed below:

- Explain the topic or issue to the group.
- Set a time limit of fifteen to twenty minutes, depending upon the size of your group and the complexity of the issue.
- Ask group members to form sub-groups of four to six people to discuss the issue and select a spokesperson who will report back to the whole group.
- Have the sub-groups record their responses on a blackboard or pieces of newsprint, so that they are able to be seen by everyone. Ask them to use only key words and phrases, not complete sentences.
- Remind everyone not to discuss, criticize, praise, or judge ideas and encourage chapter members to be spontaneous and to build on each other's ideas.
- Give each group the opportunity to share their ideas with the large group. If any ideas are vague, make sure to ask for clarification.
- Group ideas into related categories and have an open discussion about the ideas generated with the whole chapter.

3.2 POINTERS FOR DISCUSSION GROUP LEADERS

As the leader, your ideas do count in the discussion. Your thoughts, ideas, and questions may help deepen the quality of the discussion. Primarily, however it is your job to get out the ideas of others. Here are some other pointers to guide you in leading a group discussion:

- Keep a positive attitude. Encourage informality and keep a sense of humor. Help every body foster friendly differences of opinion, if it occurs.
- Listen with respect to all ideas and stress what is important. Try to keep the discussion focused on the goals and objectives of the retreat and turn the discussion away from ideas that do not positively contribute to the discussion.
- Summarize at the end of the discussion by pulling together three or four main ideas that give a sense of what the group has been discussing. You can summarize it yourself, or ask another brother in advance to be prepared to provide the group with a summary.
- End the discussion on a positive note, inspiring members of the group individually and encouraging the brothers to take action.

SECTION 4

TYPES OF RETREATS

4.1 OFFICER TRAINING RETREAT

RECOMMENDED ATTENDANCE: All past and newly-elected officers

TIMING: Immediately subsequent to elections

MATERIALS: Chapter bylaws, respective officer files, *The Code* (Constitution and General Statutes), officer manuals, officer goal sheets, [Chapter Greatness Checklist](#), officer suggestions and reminders

FORMAT:

- Get the old and new officers to sit down with their respective successors/predecessors and write a job description including duties, responsibilities, goals, dates and deadlines.
- Once the full scope of the office is written out, the new officer should complete a goal/objective sheet outlining his priorities and projected completion dates.
- Next, the new executive council should convene to review each officer's goals and to set chapter priorities in these areas. At this time, the executive committee will approve manpower and [budget](#) allocations for the various goals and objectives of the individual officers.
- Set up a calendar of approximate dates for all officers' goals.

EXPECTED RESULTS:

- ✓ Full written set of job descriptions for each chapter officer.
- ✓ Set of priorities for the executive committee, complete with due dates and budget allocations.
- ✓ Clear understanding on the part of each officer as to what is expected of him and what he wants to and will be doing next year.
- ✓ Consensus on the part of the members of the executive committee as to what is important and what is not.
- ✓ Calendar of events, not just social, for the entire term or academic year.

ORIENTATION REVIEW FOR OFFICERS:

Have the newly elected officers:

- Preview current officer guides provided by General Headquarters.
- Talk with out-going officer about programs in progress, his ideas, and possible problems developing.
- Talk with alumni and [house corporation](#) officers about assistance, techniques, history and traditions.
- Review minutes of last year's meetings for ideas and trends.
- Meet with the Greek advisor to discuss trends, impact of chapter, fraternity cooperation, and my job and how to improve it.
- Review their General Fraternity manuals: ideas, purposes, heritage international and local constitutions, bylaws, and application.
- Formulate plans for the next administration
- Decide upon plans of action to implement ideas initiated by brothers through brainstorming: goals and objectives for the chapter, and the executive council

4.2 MANAGEMENT BY OBJECTIVES (MBO)

RECOMMENDED ATTENDANCE: All chapter members and officers and an adviser or professor schooled in one MBO Program

TIMING: Start or end of an academic term

MATERIALS: School activities calendar for the upcoming terms, large regular calendar, [Chapter Greatness Checklist](#), paper and pencils, Management by Objectives

FORMAT:

- Divide the assembled members into sufficient groups to cover all aspects of chapter operations. For example, groups might cover recruitment, Phikeia education, finances, public relations, scholarship, house improvements, social activities, alumni relations and chapter participation.
- These groups will establish, through discussion, what the chapter's ideal status would be in that particular area.
- Once the ideals or goals for each group are established, the committees should determine their priority order for these goals.
- Goals are important, but without specific methods of accomplishment they are unattainable. Therefore, the committees must set down a step-by-step methodology to obtain their goals.
- After each group has established their priorities and specific method of accomplishment, they must plan out a calendar for the semester for their particular area. Each goal, event or objective should be given a specific date of completion.
- When each group has completed its calendar, all the groups will reconvene and each committee chairman will present his group's calendar to the entire chapter. Additions, deletions or corrections can be made at this time.
- Finally, the calendars for each specific area of operations will be incorporated into a large chapter calendar. It might be a good idea to post the final calendar on your chapter web site.

EXPECTED RESULTS:

✓ A complete chapter calendar outlining goals, objectives, projects, reports, events and functions.

MANAGEMENT BY OBJECTIVES EXPLAINED:

What is it?

- A method for managing the chapter.
- A method to identify critical areas of chapter operation.
- A method to develop long-range chapter goals.

Why use it?

- Allows for maximum participation of individual chapter members in the setting of goals and objectives for the entire chapter.
- Results in a plan of action for accomplishing each objective.
- Provides a method for communicating chapter performance to each member of the chapter, the chapter adviser, and the province president.
- Results in more commitment and motivation toward achieving goals and objectives.
- It is a good exposure to MBO programs used in business.
- Helps to define responsibilities and clarify expected results.

Objective setting process

- The development of an objective list is best done in an informal small group session. This can be held before, after, or instead of a normal chapter meeting.
- There should be one person to serve as the discussion leader, and one person who is responsible for writing the objectives list.
- If the chapter has less than twenty members, only one group is necessary.
- If the chapter is larger, divide the chapter up into smaller groups of no more than ten to fifteen members per group. Each group should develop its own list, with representatives from each group meeting together to come up with a consolidated list, combining similar objectives.
- Vice president: he should see that each coordinator is selected by the method he determines to be appropriate.
- As the objective list is being developed, all ideas should be considered and discussed.
- Each member should contribute at least one objective.
- At this point, the entire chapter should become involved. Each objective should be discussed so everyone has a clear understanding of what is meant, and what importance this objective has.
- Vote on the objectives list. Each objective which receives a two-thirds majority is considered to be accepted as a Chapter Objective.
- At the same time, all accepted objectives should be prioritized. This can be done by the chapter, by the executive board, or by the chapter president.
- Each accepted objective must have someone responsible for developing the plan and coordinating the necessary action. If an objective has to do with recruitment, the recruitment chairman is probably the individual who is given this coordination task. The vice president is responsible for finding a coordinator for each objective. He should select each coordinator by the method he determines to be appropriate.
- Within one week of the adoption of an objective, using the enclosed form the coordinator should identify the resources needed including dollars required, and develop a plan.

Monitoring progress

- The vice president shall be responsible for collecting each MBO form and seeing that a copy is posted in the chapter room, a copy is sent to the chapter adviser and to the province president.
- At least once a month, a report on the MBO progress to date should be presented to the chapter by each objective coordinator.
- The MBO form used to record the plan and resources should be updated and a copy sent at least every two months to the province president.

Re-evaluation

- ✓ Re-evaluate: Each goal must be periodically modified as necessary.
- ✓ Review: Resources necessary for an objective to be met.
- ✓ Rearrange: The priorities of the objective must be necessary.
- ✓ Repeat: The objective setting process twice each year. Once in the fall and again during late winter. A clear understanding on the part of all brothers as to where the chapter is headed and how they are going to get there.
- ✓ Set priorities for: Each officer and have a calendar of priorities for his specific sphere of responsibility.

4.3 MOTIVATIONAL RETREAT

RECOMMENDED ATTENDANCE: All chapter members, an expert in motivational techniques

TIMING: Anytime the chapter is experiencing motivational or attitude problems

MATERIALS: Chapter evaluation forms

FORMAT:

- The most important part of this type of retreat is to get the brothers to speak out and make their feelings known. Therefore, the first priority is to get the brothers to express what is on their minds. The confidential chapter evaluation form will serve to highlight the chapter consensus of what the problems are. Therefore, before the retreat, the form should be passed out at a chapter meeting, completed and returned without identification. Collect these forms and determine exactly where the chapter members feel the problems lie. The most commonly mentioned areas should be assigned to discussion groups.
- These small groups will discuss the problems and make recommendations for dealing with them.
- Each committee reports back to the chapter as a whole. After the reports, vote on specific recommendations by the chapter and then their implementation is discussed.
- After a break, divide the chapter into groups (not necessarily the same ones) to discuss various parts of chapter operations. This exercise is called Ideal Chapter and its purpose is to define what the brothers feel their ideal chapter would be in respect to areas such as recruitment, chapter house, image, Phikeia education, etc. If there is a difference between the current chapter and the Ideal Chapter the group should come up with ways to narrow the gap.
- If it is one particular motivational attitude problem that is affecting the chapter, it should be confronted here in large or small groups depending on which is better suited to the nature of the problem.
- The simple Proud to be a Phi exercise is very effective in clearing the air. In this practice, each brother, in turn, is given an opportunity to speak exactly what is on his mind. He concludes his statement with the words, Proud to be a Phi. No brother can respond or refute the statement of another; he is only allowed to express his personal feelings on the matter. The passing of a candle or gavel from one speaker to the next adds to the impact.
- If the problem is a lack of involvement, a good method to overcome it is to implement a standing committee system. The whole chapter can be involved by having the brothers vote for what committees they want and then having the chapter divide into these committees and have each committee write a set of goals for itself.

EXPECTED RESULTS:

- ✓ A greater understanding on the part of all brothers of the nature of chapter operations.
- ✓ A greater commitment to goals of the chapter because every brother was involved in their selection.
- ✓ The brothers will have a better feeling toward each other because they have confronted and overcome problems together.

4.4 PRE/POST INITIATION RETREAT

RECOMMENDED ATTENDANCE: All Phikeias, brothers, and invited Phi Delta Theta alumni

TIMING: Immediately prior or subsequent to initiation. Ideally the initiation ceremony could be scheduled during the retreat.

MATERIALS: *The Bond*, all initiation paraphernalia (if initiation is to take place at the retreat), *I Believe* by Arthur R. Priest, and *The Phikeia Oath*

FORMAT:

- This retreat should follow a format designed to impart the feeling of the Fraternity to the Phikeias and to renew it in the brothers.
- Candlelight ceremonies where each brother speaks on what Phi Delta Theta means to them are ideal for such events. These could be followed by small group discussions of topics such as brotherhood, responsibility, accountability, commitment and Fraternity for life.
- A number of stations can be set up where the Phikeias will be instructed in the traditions of the chapter and of Phi Delta Theta.
- If the retreat is held after initiation, discussions can be held on the meaning of *The Bond* and each of its sections. Also, a workshop on the secrets, their meaning, and a history as to how they came about would be useful.
- There are many games, demonstrations, or role-playing exercises that the chapter can employ to impart many of the emotions, feelings, and attitudes of Phi Delta Theta to the Phikeias. These should be well thought out ahead of time and constructive in nature.

EXPECTED RESULTS:

- ✓ A high degree of unity and brotherhood can be generated by this type of retreat.
- ✓ A pre/post initiation retreat can produce a very special understanding of Phi Delta Theta in the brothers and Phikeias alike.
- ✓ Many of the traditions of the chapter will be reviewed and passed along from one year to the next.

4.5 STANDARDS FOR BROTHERHOOD RETREAT

RECOMMENDED ATTENDANCE: All brothers, chapter adviser, leadership consultant or campus fraternity advisor

TIMING: At the start of the academic year or at the start of any semester

MATERIALS: Chapter evaluation sheets (from SFB Manual), paper, pencils

FORMAT:

- Distribute chapter evaluation sheets to the brothers. Each brother completes the forms and passes them back. This will yield a chapter consensus as to what the brothers feel are the chapter's strengths and weaknesses.
- Each of the areas that have been recognized as being one of the chapter's greatest weaknesses should be assigned to individual discussion groups. These groups would be charged with assigning a plan for elevating the chapter's status in that particular area. These plans should include specific recommendations, dates, events, and necessary budget allocations.
- Next, the entire chapter should reconvene to hear the plans. Once the plans have been presented, the chapter must vote on which ones they feel are practical and to which they are committed.
- Establish the order in which the chapter should attack these weaknesses.

EXPECTED RESULTS:

- ✓ The entire brotherhood can gain an understanding as to where the chapter stands. Too often, many brothers simply do not know how the chapter is fairing in certain areas.
- ✓ Generate a plan of attack to overcome some of the weaknesses currently facing the chapter.
- ✓ If the brothers are on top of the situation, no problems will be permitted to catch the chapter by surprise.

SECTION 5

SPECIFIC PROBLEM RETREATS

RECOMMENDED ATTENDANCE: Depending on the nature of the problem, committees elected members or the entire chapter. In any case, an expert in the particular field should be invited.

MATERIALS: See specific problem

TIMING: See specific problem

FORMAT:

- The participants of the retreat should first get to the root of the problem and list the causes. For example—why hasn't recruitment been as successful as you wanted it to be in the past? Why is the chapter having financial problems?
- Once problems have been determined, it is much easier to come up with solutions. If the problem is specific, the entire group should consider it; if it is broad, groups should be utilized to consider its component parts.
- When solutions have been outlined by the specific committees, the entire group should reconvene and establish a program to deal with the problem. At this time, written programs, budgets, policies and individuals responsible should be defined.

EXPECTED RESULTS:

- ✓ An understanding of the problem(s) confronting the chapter. Recognizing that the problem does exist is not sufficient. The causes of the problem must be discovered.
- ✓ A solution set to overcome the problems. A plan of attack is essential to correct any problem.
- ✓ A consensus that the problem does exist will be arrived at along with the chapter's commitment to one particular plan of action.

5.1 RECRUITMENT SEMINAR

TIMING: Immediately prior to the formal recruitment period

MATERIALS: Black board or large sheets of writing paper, [Recruitment Chairman's Manual](#)

QUESTIONS:

- What is the chapter's image to the study body, faculty, and general public?
- How would we like to be perceived by the student body, faculty, and general public?
- Do our recruitment functions attract people and at the same time permit interaction and dialogue?
- Do we rely on parties as the chapter's only recruitment tool?
- What characteristics do the brothers of Phi Delta Theta sell to potential new members?
- What kind of man do we want to recruit and eventually pledge?
- Why did we join Phi Delta Theta?
- What are our most successful recruitment functions? Why?
- How can we get potential new members to remember the name Phi Delta Theta?
- What are the best things to say during recruitment?
- What are the most common objections heard during recruitment?
- How large should we be?
- Is there a need for more careful selection of our Phikeia to insure initiation?
- What persuades a man to join our chapter?
- Why do we lose Phikeia?
- Does the university system encourage men to join fraternities?
- Are we organized to properly present our chapter to strangers?
- Do we follow enthusiastically our recruitment leads?
- Will summer recruitment help us? Did we ever try it?
- Do we live the ideals of Phi Delta Theta for others to see?
- Do we study our needs before we recruit?

Organize a recruitment committee, it is their responsibility to find answers and solutions to the following areas:

- What is the active chapter's attitude regarding its alumni? Alumni from other chapters?
- What contact do alumni feel is significant?
- What does the active chapter do to encourage alumni to participate?
- What role should alumni play in chapter operations?
- How involved should alumni be in chapter operations?
- Should we invite parents to chapter functions?
- How often should we publish a newsletter to keep alumni and parents informed?
- Do we publicize our chapter's accomplishments in *The Scroll*, campus and local papers?

ASSIGNMENTS:

- ✓ Prepare a calendar of recruitment events.
- ✓ Compile a list of the do's and don'ts of recruitment.
- ✓ Make a list of what Phi Delta Theta has to sell.
- ✓ Outline common objections to joining Phi Delta Theta and good responses to them.
- ✓ Hold a seminar and bring an experienced recruiter to teach members how to sell Phi Delta Theta.

5.2 SCHOLARSHIP

TIMING: At the start of the academic semester or prior to exams

MATERIALS: [Scholarship Chairman's Manual](#)

QUESTIONS:

- Why are the brothers having academic problems?
- Are the Fraternity's activities detracting from the brothers'/Phikeias' academic performance?
- What does the Fraternity do to promote scholarship among members?
- Is there an emphasis on scholastic achievement in the brotherhood?
- Should the Fraternity get involved in the academic performance of the members?
- What resources are available on campus for the brothers to use?
- Do we need study/quiet hours?

NOTE: It would be a good idea to invite someone from the campus study skills center to make a presentation at the retreat.

ASSIGNMENTS:

- ✓ Write a comprehensive scholarship program for the brothers.
- ✓ List the chapter's available resources.

5.3 PUBLIC RELATIONS

TIMING: Anytime

MATERIALS: Suggestions for public relations, [Alumni Secretary's Guide](#)

QUESTIONS:

- What kind of image do we have on campus? With our alumni? With the university?
- What can we do to promote good relations with the faculty/neighbors?
- What services can we provide for the alumni? What do we do?
- What is the point of community service? Do we have enough Community Service Day events?
- Are we always selling Phi Delta Theta? Should we?
- How do we answer the door/phone? Is this the best way?
- Do we send out thank you and congratulation notes? Should we?
- What event last year was most successful in promoting the name of Phi Delta Theta?
- Do we honor local alumni, faculty, and university officials for outstanding work?

ASSIGNMENTS:

- ✓ Come up with a list of what the chapter plans to do for the alumni.
- ✓ Prepare a schedule of events or deeds designed to promote the name of Phi Delta Theta.

5.4 PHIKEIA EDUCATION

TIMING: Immediately prior to Phikeias induction or initiation.

MATERIALS: The Phikeia Program

QUESTIONS:

- Do we look at our Phikeias as potential brothers or as merely Phikeias?
- What knowledge and qualities would we like the Phikeias to possess at the end of pledgship?
- Would it help to write the parents of the Phikeias right after formal pledgship to outline the Phikeias program to them?
- Should we do it?
- Do the brothers *teach* the Phikeias during the new member education period on how to be good brothers through example?
- What is the purpose of the Big Brother program? Are we achieving these ends?
- What are the needs of the Phikeias whom we invite to join the brotherhood?
- What do we feel the Phikeias must know before he can contribute effectively to the chapter?
- Does our program make every Phikeias meeting vital and stimulating?
- Do we foster the growth of the individual during the Phikeias period?
- Is there emphasis on the scholastic needs of the Phikeias?
- Does the Phikeias program balance hard work, study and good times?
- Should we instruct in manners and conduct as part of our Phikeia Education Program?
- Should we invite guest speakers?
- Do we encourage neatness, organization and friendly competition within the Phikeias class?
- Do we foster the close association among Phikeias and between Phikeias and actives?

ASSIGNMENTS:

- ✓ Construct a written Phikeia Education program including all the material the Phikeias should learn (see [Phikeia Educator's Manual](#)) right up to the initiation ceremony.
- ✓ Examine the FEA Statement of Position and Policy on [hazing](#) and insure the chapter adheres to it.
- ✓ Plan a syllabus for Phikeias education and activities. Write a calendar of due dates.
- ✓ Compile a list of Phikeias needs.

5.5 HOUSE REPAIRS/MAINTENANCE

TIMING: Early fall or spring

MATERIALS: Budget, any materials necessary to fix or maintain the house, estimates for specific projects, house manager's file

QUESTIONS:

- Are we pleased with the way the house looks?
- How can the brothers better insure maintenance of the chapter house?
- What projects would we most like to undertake to improve the appearance or facilities of the chapter house?
- What kind of Phikeias projects should be undertaken this year?
- Do we have pride in our chapter house?
- What have we done for the [house corporation](#)? What can they do for us?

ASSIGNMENTS:

- ✓ Compile a priority list of what we need to work on in the house.
- ✓ Compile a priority list of what the [house corporation](#) can do (complete with cost estimates).
- ✓ Complete a program to insure proper chapter house maintenance.
- ✓ Undertake a specific project and complete it prior to the end of the retreat.

5.6 FINANCES

TIMING: At the beginning of the academic year or when a financial crisis arises.

MATERIALS: Treasurer's reports, audit, [budget](#), calculator, [Treasurer's Manual](#)

QUESTIONS:

- Does everyone know and keep his responsibility to maintain the financial health of the chapter?
- Are our fees sufficient to cover our costs?
- How can we get brothers to pay their bills promptly?
- How can we collect delinquent bills from alumni?
- Do we need a fund raiser? If so, what would be an effective one?
- How did we get into the red?
- Why do we need to file reports on a timely basis?
- Why do we have men who don't pay bills?
- What do we want to do to insure we are solvent?
- Are our costs within range of the other Greeks on campus?
- Are our costs competitive with non-campus/on-campus facilities?
- Does every man know his financial obligation before pledging and initiation?
- Are we honest about fraternity costs?
- Do we get a chance to air our views on the [budget](#)?
- Are we spending our money realistically?
- Do we have our own housing fund to prepare for future building?
- Are all our members aware of the financial responsibility of group living?

ASSIGNMENTS:

- ✓ Construct a realistic [budget](#) to carry the chapter through the academic year.
- ✓ Come up with a list of workable fund raisers.
- ✓ Come up with a plan for collecting bills on time.
- ✓ Devise a plan to collect delinquent bills from alumni.
- ✓ Come up with an adequate billing system.

SECTION 6

CHAPTER EVALUATION

A Checklist for Identifying Areas of Concern

In considering your chapter's present efforts, problems, and leadership, evaluate the following concerns in relation to the improvements you seek. If you have trouble assessing the chapter's success in these areas, it may be that the chapter's goals are not clearly stated and understood by the members. Urge all your members to complete this survey on an annual basis.

	STRONG	OK	WEAK	NEED TO ADD
Chapter Leadership				
Chapter goals are clearly defined				
Chapter unity and cooperation				
Chapter understanding of "Fraternity"				
Organization and pre-planning of activities				
Use assistants in offices				
Cooperative scheduling of activities				
Member involvement in activities				
Communication between chapter and international				
Cooperation with IFC/Panhellenic				
Chapter acceptance of change				
Officer cooperation				
Officer acceptance of leadership				
Recruitment				
Member interest in joining a fraternity				
Member positive attitude				
Relating why Greek and why Fraternity				
Style and techniques of recruitment				
Person-to-person contact in recruitment				
Organization and planning to total recruitment program				
Panhellenic/IFC rules and policies				
Budgeting time, people, and work for recruitment				
Effective use of summer recruitment				
Alum references and assistance in recruitment				
Upperclassmen and transfer student recruitment				
Mixing social activities and recruitment				
Fraternity Education				
Meaningful fraternity education				
Phikeia equality - no double standards				
Member interest in Phikeia and program				
Phikeia involvement in the chapter				
Phikeia involvement in campus activities				
Understanding of Fraternity traditions				

	STRONG	OK	WEAK	NEED TO ADD
Responsibilities of membership				
Commitment to Fraternity				
Scholarship				
Reduce depledgings				
Finances				
Accounts receivable are at a minimum				
Accounts payable are current				
Monthly financial statements are made				
A yearly budget is followed, and re-evaluated periodically				
The chapter uses a sound bookkeeping procedure				
Alumni and Public Relations				
Regular publications are sent to alumni at least twice yearly				
Alumni are advised of pledging success				
Alumni receive advance notice of special functions				
The respect and reputation of the chapter				
Community service projects				
Individual and chapter participation in communication programs				
Social				
Social emphasis in chapter				
Extent of members' feelings and ideas used				
New and creative activities				
Extent of members' involvement in social activities				
Inter-Greek functions				
Activities are fun				

Sample Retreat Evaluation Questionnaire

1. How were the housing accommodations adequate?
2. How were the food accommodations adequate?
3. How do you think the chapter made progress and in what areas?
4. What discussion topics did you find pertinent?
5. What aspects of the retreat did you find useful?
6. What did you like best about the retreat?
7. What areas of the retreat did you think need improvement?
8. What changes or improvements could be made for future retreats?
9. How do you think this retreat can be used next year?

SECTION 7

OBJECTIVES LIST

Prepared By: _____

Date: _____

PRIORITY	OBJECTIVE	COORDINATOR
1	Have 25 members living in the house by January 1	_____
2	Have 20 Phikeia minimum during fall quarter	_____
3	Have a \$0 accounts receivable by October 1	_____
4	Obtain an overall chapter GPA of at least 2.90 during winter quarter	_____
5	Alumni Relations: Invite at least three alumni to dinner every Monday night Issue an alumni newsletter by November 1	_____
6	Keep 90 percent of the chapter meetings to under 1 ½ hours during the year	_____
7	Complete two community service day projects by June 1	_____
8	Get two members involved with student senate by March 1	_____
9	Organize 50th anniversary planning committee by June 1	_____
10	Have at least 100 alumni at Founders Day Dinner	_____

SECTION 8

CHAPTER BALANCE SHEET

Often we need to ask ourselves a few questions before we know how we stand as a chapter. A few good questions to ask ourselves are:

- Is there a chapter consensus as to where we are headed?
- Does every member participate in the decision-making process?
- Does every member do his share in chapter operations?
- Do the officers know what the chapter members really want?
- Does everyone have a strong feeling about Phi Delta Theta?
- Do we know what is contained in *The Bond*, which we all signed?
- What is our self image?
- What things do we, as a chapter, do well?
- What do we have trouble doing?
- Do we work together?
- Do we have definite goals? Should we?
- How can we have a higher profile on campus?
- What weaknesses do we need to correct this year?
- Does the chapter support its officers?
- How much do we want to be successful?
- What do we want out of fraternity life?
- What can each of us contribute to make Fraternity life more meaningful?



PHI DELTA THETA
Become the greatest version of yourself