

FarmHouse International Fraternity

Chapter Retreat & Strategic Planning Handbook



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FarmHouse International Fraternity
Chapter Retreat & Strategic Planning Handbook

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I. INTRODUCTION

Purpose

Chapter retreats can be used for a variety of reasons, and are often the most effective way to create change in your fraternity. Retreats enable the chapter to tackle issues that are beyond the scope or ability of a chapter meeting and address areas of concern outside the day-to-day distractions that can make focusing on a single idea or topic so difficult. This document includes an overview of the different types of retreats, a specific look at the most common retreat (the “chapter inventory” retreat) and sample agendas, activities, and evaluations.

Types of Retreats

Listed below are 5 types of commonly used retreats in FarmHouse. Included is information about who should attend, when they should be held, and what should be covered.

1. Officer transition retreat

This retreat should be attended by all past and newly elected officers after an election, before the new officers assume their responsibilities (and before the outgoing officers graduate). It enables the new officers to review their job descriptions, officers’ notebooks, information from the International Headquarters, and helps establish priorities for each officer and the executive committee based upon the prior officer’s evaluations. A calendar for the upcoming semester should begin to be compiled during this retreat. Chapter advisors or association leaders might facilitate.

2. Strategic Planning retreat

This retreat is vital to the success of a chapter. Strategic planning retreats should be held at least once a year, whether it be in January (at the beginning of officer terms) or in August/September (at the beginning of the academic year). A full weekend, away from campus, is needed. It provides the entire chapter with a chance to evaluate progress and direction, (re)shape the chapter’s direction as needed, define the chapter’s overall goals and vision for success. Once vital signs are defined, the chapter re-shapes the committees to align with the new strategic plan priority areas and begins to evaluate these critical areas of chapter operations and establish objectives, strategies, activities and timelines to achieve them. An outside facilitator is desired.

3. Brotherhood retreat

All active members and new members will participate in this retreat, which can be held anytime a chapter is experiencing motivational or attitude problems. Then discussion groups can review the problems and create specific recommendations to overcome them. A questionnaire is often used to initiate the discussion

4. New Member retreat

This retreat is held as soon after the pledging ceremony as possible (ideally one of the first 2 weekends of classes), overnight away from the chapter house. The purpose of the retreat is for the new pledge class to set tentative dates and work on plans for the new members’ community service project, brotherhood function, social mixer with sorority pledge class, and new member class project. They may also participate in high or low ropes course activities and other positive activities designed to orient them to FarmHouse. The new members might also elect new member class officers at the end of retreat (minimally a president, social chair, song leader). The Director of New Member Education should attend as well as select members of the Member Education Committee.

5. Spiritual/Service retreat

To help brothers dig deeper within themselves and give back to the community, chapters may choose to plan an overnight retreat that would include a valuable hands-on service component and an evaluation of their spiritual gifts, behavioral style, passions and experiences. Members might arrange to conduct the spiritual retreat and camp out with tents on the ground of a children's camp retreat center in exchange for a full day's worth of camp clean-up, building fence, etc. An outside facilitator is needed. Any brother could participate. (Chapter's could re-shape this type of retreat to be a bit more comprehensive and refer to it as the "4-Fold Retreat" or "4 Pillars Retreat")

Facilitators

Depending on the type of retreat, it may make sense to have a person who is not a member of the chapter lead the retreat. The retreat planner and the facilitator should set the agenda. Depending on the nature of the retreat, the President, Director of Administration, Chaplain, or Social & Brotherhood Chairman may lead the retreat. In addition, an alumnus, advisor, faculty member, or member of the university staff may be better suited to facilitate a retreat on a particular topic. Whoever is selected, it should be clear that there is one facilitator controlling the agenda and presiding over the business of the retreat.

II. PLANNING A RETREAT

Goals

Every retreat needs a purpose – a reason for shutting out the rest of the world to focus on the matter at hand. These goals should be discussed in advance and the retreat topics and exercises should be conducted with these goals in mind. It may be simple, but the retreat's goals need to be stated so everyone can focus on making the retreat as successful as possible. Each member should discuss his vision for the chapter and be involved in goal development. This will enable each member to commit to the goals of the retreat and the chapter. Common goals include finding ways to improve various areas of chapter operations, to promote brotherhood, or conflict resolution.

Agenda

The agenda will be determined by the goals of the retreat. If there is a lot that needs to be accomplished, the business of the retreat may cover more than one day – when planning the retreat, the goals must be prioritized so that the most important items are addressed. The agenda should also evaluate progress made on the chapter's goals since the last retreat and address potential challenges in the future. The agenda should review the new chapter goals, their timetables and any budgets associated with accomplishing those tasks and at least some time for open, unstructured discussion. The agenda should have a good balance of exercises and reflection.

Environment

Location

The retreat ideally not only closes brothers off from distractions, but it will be in an environment that is actually withdrawn from daily campus life and forces the members out of their traditional routines. When finding an effective location, cost is important. The university should have facilities that are free or close to it. 4-H Youth Retreat Centers, Boy Scout camps, County Fairgrounds or churches in your area often let you use their buildings for a small donation. Comfortable accommodations are vital to keeping the attendees engaged. Food arrangements are often overlooked; make sure that if you intend to have food, it is permitted in the facility. Other sites to look at include summer camp, resort lodges, summer cabins, church retreat centers, and large private homes.

The availability and cost of facilities may determine the length of the retreat.

Food

Meals are a common way of bonding, processing the day's events, and relaxing. Being well fed makes people more relaxed and, if you are providing the food, eliminates yet another source of outside distractions. These meals are an incentive in and of themselves for brothers to make the trip. If your budget does not allow for meals, you still need to determine how the brothers' nutritional needs will be met, so have a plan in place. The members should know what they are expected to provide or pay for any retreat, even, if you are camping out, make sure the chapter knows what is required of them compared to what the facility may provide. If you are having an all-day retreat, most chapters eat meals as follows:

- Breakfast – donuts/bagels & juice
- Lunch – sandwiches from local restaurant or make your own
- Dinner – order in pizza, etc

After you have decided on a menu, you should then make a grocery list of the quantities needed. Do not forget condiments, napkins, utensils, etc. Buy in bulk – it is cheaper! Remember to include some high-energy foods and fruits for snacks! Food costs may vary, and you might wish to check the grocery stores around your campsite before buying. Many groups buy from local merchants before they go.

Supplies

The supplies that you will need for your exercises may not be available at the facility. While no one enjoys bringing a lot of extra luggage, you should check in advance to see what the facility provides or what can be purchased nearby. Possible items include: flip charts/easels, LCD projector, laptop computer, paper, pencils, chalkboards, poster board, other visual aid equipment, magic markers and chalk, masking tape, recreational equipment.

Commitment

There needs to be a commitment to the goals and process of the retreat from the chapter. Otherwise, the retreat will not be effective. The retreat planners and facilitators need to motivate the retreat's targeted group in advance so they are excited about the event and demonstrate the commitment of leadership to the retreat.

Budget & Expenses

An important part of planning a retreat is to conduct it under the terms of the allocated budget. Ideally, out-of-pocket expenses by the members will be minimal. Budgeting for the retreat demonstrates the chapter's priorities – building brotherhood and developing goals and a plan to achieve them that continually improve the chapter. If a retreat has not been budgeted, compute your anticipated expenses and review them with the Vice President –Finance and the Executive Council, determining the best way to fund the retreat. Then have the chapter approve the method. Funds can come from general chapter funds, per man cost assessed to each person in attendance, a fundraiser, alumni donations, a mothers' club, or some combination of these methods. Compare costs and try to get the best price for food, lodging, transportation and supplies.

Picking a Date

It is important that everyone the retreat targets can attend the event. This can be very difficult, especially for the many brothers who are involved in athletics or leaders of campus organizations. The importance of the retreat should be emphasized – request that brothers reschedule possible conflicts. Good times to hold a retreat include:

FALL
Orientation Week
Immediately after Thanksgiving
Away Football games
Before the Fall Recruitment Period

SPRING
Orientation Week
Prior to Spring Recruitment Period
Immediately after Spring Break

Promotion

Inform the brothers about the retreat early and often. For as long as possible before the retreat, include it in the Director of Administration's officer report. As the time draws closer, tell them the location, time, costs, dress (especially if you'll be physically active), and directions to the location (provide a map).

Put posters and signs up in a highly visible area or put messages in brothers' mailboxes. Include information on your listserv and make sure that brothers who do not live in the house are aware of all the information as well. Make sure everyone is aware that they need to plan to be on time and stay till the end.

Follow-up

A retreat is the opportunity to set goals and chart a path to achieve them over the following weeks and months. If the chapter does not follow-through on that plan, the retreat served no long-term purpose. Plan your retreat follow-up framework before the event begins. You should have the chapter, university academic calendar and FH International calendar to enable specific target deadlines. Have pre-printed sheets that the brothers can complete with their role in accomplishing goals from the retreat and the accompanying timeline. After the retreat, you should also do the following:

- Type up the goals and give one to each member.
- Post the retreat goals in a very visible place in the chapter house.
- Officers give monthly reports on the progress of those goals.
- Evaluate your goals regularly.
- Make tangible and specific activities to achieve your goals, benchmarks that build to the final goal.

Tips for a Successful Chapter Retreat (in general)

- Hold it before the school year starts or soon after recruitment ends
- Include structured recreation time
- Make sure everyone who is supposed to attend is in attendance and *participates* (offer incentives if necessary)
- Find an area away from familiar surroundings
- Prepare a written agenda
- Include chapter advisors
- Come to a consensus on key chapter goals
- Lose your "cool cap" and be willing to try different roles at the retreat
- Brothers should come ready to help other groups and brothers, not just their own office's needs.
- Be willing to compromise when differences arise

III. FACILITATING

Definition of a Facilitator

A facilitator should not lecture the brothers in what is right and wrong but instead guides them to determine their own answers. The facilitator leads the group to the **right** solutions to the topics/problems that are being discussed. In being a good facilitator you will direct the conversations and discussions without really “teaching” down to them.

The key to running a successful retreat is to know the difference between “facilitating” and “teaching.” Everyone is familiar with the standard teaching model where an instructor shares his or her knowledge of the subject with the student. Here the teacher possesses all of the facts and the students merely absorb the information. Unfortunately this is not a very dynamic learning methodology since it assumes that the teacher has all of the answers – which is often not the case.

Being an effective group facilitator does not require professional skills or the ability to entertain the participants. People simply enjoy learning and absorb more when they have the opportunity to take part in and contribute to the process. The secret to being successful lies in guiding the participants through information and activities in a way that encourages their active participation.

A facilitator creates the setting for dialogue on shared issues of concern, and to the extent possible, a consensus on actions and implementation. Facilitators are the people with the questions, not the answers.

Skills and Techniques

There are many components of being an effect facilitator but probably the most important one is that of being an active listener. The following are some core facilitator competencies:

Communication:

- Expressing ideas clearly and accurately
- Showing a lively interest in the subject
- Thinking well on his feet
- Showing a sense of humor with a sense of seriousness

Regulating Remarks:

- Call the group’s attention to particularly helpful statements
- Rephrase participant’s ideas to clarify and reinforce
- Avoid expressing personal opinions
- Summarizes at appropriate times

Encourages Participation:

- Participation is distributed evenly among members
- Maintains eye contact with the entire group
- Stays alert to nonverbal cues of interest and boredom

Accepting Atmosphere:

- Insists that group members respect each other’s opinions
- Shows an interest in the opinions of all members
- Accepts and supports minority views

Summarization:

- Has participants summarize main points
- Encourages participants to explain how their ideas/opinions have changed
- Encourages participants to predict how the discussion could affect future behavior

A successful facilitator realizes that he is not there to provide the answers but instead, to gather information. Be excited to hear what everyone has to say and that enthusiasm will be contagious. The following are some things to keep in mind while the meeting is running.

- Keep stating the current question to keep the discussion focused.
- Protect everybody there by acting fairly, giving all a chance to speak, taking the time for and respecting minority opinions and critiques.
- There is great knowledge hidden in any group; consider the lessons of the “life raft” experiment: give any group the assignment of listing what they would need to survive on a life-raft, they usually can identify by consensus discussion 90% of the items that an expert group would recommend.
- Record everything on the board – by recording all ideas, everyone feels valued.
- Become UNIMPORTANT. The best facilitators blend into the background.
- Work hard at not judging; assume everyone has a valid viewpoint
- Stay process oriented; you are not a problem solver, let the group make its own evaluation and take responsibility for action

Try to be disclosing; state what your own values and opinions are, but in a manner that is participatory, rather than directive. ALWAYS emphasize that your ideas are just that, ideas, and not necessarily the right ones. Everyone has opinions, even you so do not be afraid to express them as long as it is not done in an authoritative way.

Handling Participant Reactions

When conducting any program, you will encounter many different kinds of reactions from your participants. Generally speaking, you can be successful if you remember that these people are not consciously trying to make your life difficult. All they need is recognition as individuals, motivation, guidance, and encouragement. The following material provides suggestions for how you may effectively handle a variety of participant reactions:

Overly Talkative

This person may be well informed, naturally talkative, or just wants to show off. Do not embarrass this person or be sarcastic. Suggest to him: “That’s an interesting point, now let’s see what the group thinks of it.” In general, let the group take care of him as much as possible.

Argumentative

This person may just enjoy heckling you or may be upset about something else in his life. Do not lose your temper! When he makes an obvious misstatement, toss it to the group...Let them turn it down. As a last resort, you can talk to him privately during a break. Try to dig out what the problem is. Ask for his cooperation.

Too Helpful

This person may actually be trying to help out but makes your job difficult and keeps others out of the conversations. Cut across him tactfully by questioning others. Thank him for the comments and suggest, "We put others to work." Use him for summarizing.

Rambles

This person tends to go on and on. He takes off on a topic and goes far on a tangent. He may use far-fetched analogies. When this person finally stops for a breath, thank him, refocus his attention by restating the relevant points, and move on. As a last resort, thank the person, glance at your watch, and state that we must move on if we are to cover all the material.

Obstinate

This person refuses to see your point and will not budge from his opinion. Throw his view to the group, and allow the participants to straighten him out. Tell him that time is short and you'll be glad to discuss it later in private.

Talks About the Wrong Subject

Take the blame by saying, "Something I said must have led us off the subject." Restate the point.

Converses with Neighbor

The conversation may or may not be related to the topic under discussion. In any event, this behavior can be very distracting to the other participants and to you. Do not embarrass them, call one by name and ask an easy question. Another approach is to call one of them by name, restate the last opinion expressed or the last remark made by a participant, and ask his opinion of it. Another technique, if you are in the habitat of moving around the room, is to saunter over and stand casually behind those talking. This should not be made obvious to the group. As a last resort, talk to them privately during a break and ask for their full cooperation.

Inarticulate

This person lacks the ability to put his thoughts in the proper words. Do not say, "What you mean is this..." instead say, "So let me see if I am hearing you correctly, what you are saying is..." (Then put it into better language). Twist his ideas as little as possible, but try to have them make sense.

As you have just read, to be an effective facilitator you should let the participants come to their own conclusions and lead the direction of the conversation. This is all well and good until you find that the consensus that is reached goes against the values and policies of FarmHouse. Obviously, you need to ensure that these are upheld and respected. When a large portion of the group that sees nothing wrong with hazing or starting fights with other fraternities, you must correct them.

Helpful Tips

Create a positive first impression

Let the manner of your delivery, your attitude, and the tone of your voice shows clearly that:

- You are organized and well prepared
- You feel strongly about the importance of the chapter meetings
- You respect the knowledge and experience of the group

Room Organization

If possible, place all the chairs in a circle. This way you are not viewed as “the head of the class” and it puts everyone on an equal stance. This is also a more effective way for everyone to hear each other.

Use of Language

Try to assess your group and proceed from there. Avoid “talking down” to the participants. Treat participants with respect, acknowledging their contribution as adults. Become “one of the guys”.

Ask “Open-ended” Questions

These are questions that cannot be answered with a simple yes or no. They require people to think and explain. They encourage discussion. For example, rather than asking “do you agree with that?” try “What do you think about that?”

Learn Everyone’s Name

Obviously if a brother is facilitating the retreat, this will not be a problem. For outside facilitators, it is simply a matter of respect to refer to everyone by their name. It will also make members feel that who he/she is and what he/she has to say is important.

Silence is OK

Do not panic if there is no immediate response to a question or subject. Give them time to respond. As the chapter meetings progress the comfort level of participant will facilitate discussion. If, however, there is no response to a subject, call on one of the participants by name, restate the question, and ask for his opinion.

Provide Positive Reinforcement

Make it a point of thanking participants for their answers and opinions. Participants are encouraged to talk if they see that you value their thoughts.

Get Everybody to Participate

Do not rely on just a few people to do all the talking. Make a real effort to give everyone an opportunity to contribute – especially newer members. Remember that the more others talk, the less you have to.

Your Introduction and Closing Comments

Getting started is the hardest part. A well-planned introduction helps overcome any initial nervousness you may have and “gets the ball rolling.” Once you get past this point, the rest will come very easily if you know your material. Likewise, well-prepared and rehearsed closing comments help you bring each session to a definite and smooth conclusion.

Using the Flip Chart and Blackboard

Make sure your handwriting is legible. If you have trouble writing clearly, then print. Letters to be seen at a distance of 3ft should be at least 2 ½ inches high. And when you finish writing, step away so everyone can see. Talk to the class, not to the blackboard or flip chart. Participants at the rear of the room will probably have difficulty seeing the lower portion of the board or flip chart.

Look at Everyone

An extremely effective technique in small to medium-sized groups is to continually make direct eye contact with each person in the audience. Make an effort to constantly shift your gaze from one person to the next. This creates a feeling in the minds of the participants that you are talking directly to them.

IV. EXERCISES

Goal Setting

Brothers and new members will take ownership and “buy into” the direction of the chapter if they are part of setting and attaining the chapter’s goals. They also provide officers and committee chairmen a basis for evaluating their own effectiveness. For a chapter to operate well, it must set and define goals. The best place to set goals for the chapter is at the semi-annual retreat. Below are some helpful hints in goal setting.

- Ask all members to write down goals for the chapter. Do not allow discussion or debate on these ideas yet; allow all members to express their desires freely on paper, no matter how unusual.
- Have each brother read his goals for the chapter. All goals should be recorded, and credit should be given to the owner.
- Discuss the goals after they are presented.
- After the entire list is developed, open discussion and lead the chapter towards consensus on the goals that are most important.
- Evaluation. Is each goal: **SMART**? If it is not all five of these, then the goal needs to be re-thought or restated so that it does pass this test.
 - Specific
 - Measurable
 - Attainable
 - Realistic
 - Timely
- Divide into groups and discuss how this goal will be accomplished.
- Make a written list of all chapter goals and how they are to be accomplished, give this list to all brothers and new members.
- Define objectives and tasks, and delegate each one to a brother (or group of brothers).
- All brothers/new members become involved in the direction of the chapter.
- The committee chairmen do not become overloaded with too much work.
- All brothers/new members will know what the chapter is going to accomplish.

There are five steps to the process of goal setting.

1. Mission Statement
 - Discuss and agree on purpose of group
 - Why does organization exist? To do what?
2. Goal Statement
 - Brainstorm possible goals
 - Evaluate, condense and select (the goals should complement each other, not conflict; they should be ones the whole group can live and strive for)
 - Prioritize (the chapter can only work on a certain number of goals at one time; which ones should be worked on first?)
 - Provide each member of the chapter with a copy of the goals

3. Objectives

- Objectives are methods by which the goals are achieved; state specific objectives for each goal; objectives must be worthwhile, reasonable, measurable, and time-sensitive
- Brainstorm objectives for each goal, one at a time
- Sort out repeated objectives; condense, evaluate, and eliminate
- Check each against criteria
- Are the objectives concise? Make sure there are not too many objectives for each goal
- Will you achieve the goal if you achieve all of the objectives?
- Give a copy of the goals and objectives to all brothers

4. Action Plan

- For each objective, list the steps necessary to complete each objective; for each step, indicate who is responsible for completing it and the target date for completion

5. Evaluation

- Evaluate the progress toward the goals; modify goals, objectives and action plans if necessary

Strategic Planning

The chapter executive board has usually brainstormed with Association leaders and Advisors about goals in 1 year and/or 3-5 year increments. But often, the entire chapter has not been involved or a more extensive process has not been undertaken. The following model is useful for chapters to develop a comprehensive chapter strategic plan and takes about 7 hours to complete, with an additional 1-2 hour meeting for follow-up.

1. Have everyone introduce himself and share “What does FarmHouse mean to you?”
2. Provide overview/basics for the process.
3. Personal reflection – How many have developed written down goals for life? Share these thoughts.
4. Personal reflection – Look at the same questions from another perspective, write your obituary after living for 70 years.
5. Personal reflection – List 5 long-term goals for your life and share them.
6. In groups, have participants draw the Ideal FarmHouse Man.
7. In new groups, describe the chapter you hope to return to 5 years after graduation.
8. Distribute and review sample strategic plans, available at the end of this handbook or on www.farmhouse.org/strategic_plans.htm
9. What are the values of the Chapter?
10. What external trends/threats affect FarmHouse?
11. Strengths
12. Weaknesses
13. Opportunities
14. What language do you want to include in mission statement?
15. Do we want a separate Chapter Mission Statement or have the Object serve that function?
16. Write a mission statement in new small groups.
17. Have chapter vote on what mission statement it wants to adopt.
18. Discuss the concept of vital signs. Have everyone roam room reviewing each group’s various strengths, weaknesses, opportunities, and strategic plans to identify the vital signs of the Chapter.
19. Narrow the possible vital signs to 5 – 8.
20. Create SMART goals to address the vital signs.
21. Break up into groups, each charged with developing two 1-year goals, two 5-year goals and action steps to reach them for each vital sign. Members rotated into different groups for each vital sign.
22. Finally, after developing 1-year goals, 5-year goals and action steps to reach those goals in each vital sign area, finalize the strategic plan by incorporating into chapter operations:
 - a. Re-align the chapters’ committee structure to focus on the identified vital signs.
 - b. Have each brother serve on at least one of the committees.
 - c. Have the committees meet for a special 1-hour meeting to determine who is responsible for each step and determine the timeline for each step.
 - d. Encourage the chapter to incorporate the strategic plan update into chapter meetings, with each committee providing update on plan and its progress on the action steps once per month.

Value Shields

Each participant will need one sheet of paper and one pen or pencil per participant. Then the participants number off and divide into even groups. Being conscious of the time you have for the activity, understand the bigger the groups the better; this will allow more members to witness the sharing of others. The benefits of this exercise include:

- Awareness of the difficulty people have accepting compliments.
- Identifying personal strengths people did not know they possess.
- Recognizing the many and varied strengths of the group and the resources it possess.
- The ability to recognize how much better things are in a positive environment.
- Developing trust and good-will in the group.

The Procedure

1. *The facilitator should describe the exercise in the following manner:* “I thought it might be interesting for all of us to get to know each other in a better way. I have an activity called “Value Shields” that I think will make this possible. It involves nothing more than sharing a little about yourself – things you like and value – with other people in your group. If you choose to share nothing at all, that is up to you.”
2. Give each person a piece of paper and instruct them as follows: Divide the paper into four quadrants. Facilitator should draw his own on newsprint or the blackboard. An example is in Section V.
3. Ask the questions from each quadrant of the value shield and have each person answer on their own sheet of paper. Give the group an appropriate amount of time to think of a thoughtful and sincere answer. Inform the group that they do not need to write a novel. They will be sharing their answers later with the group; therefore, one-word answers or 1-2 sentences will suffice, as long as it reminds them of the answer to their question.

*Note: The facilitator should share his own answers with the group. This will reduce reluctance on the part of the participant’s to answer the questions.

Sharing the Shield

1. Have each person individually share their responses to each question to their group. Remember to emphasize that they do not have to respond to a question if they choose not to.
2. Every person should share each answer with the group before moving on to the next person.

Feedback

Following the sharing period the individual who shared remains totally quiet while the other members of his group give feedback. It is important to emphasize that feedback should only be positive. It should concentrate on new things that you find about the person sharing. Examples of feedback: “I was impressed by...” “I was happy to hear...” “I never knew before, but am happy to have heard that...”

Discussion

After all have shared and feedback is given, debrief the session, emphasizing these points:

- How do you feel right now?
- What can be gained by feeling like you do right now?
- What did you like best about this exercise?
- Did you learn anything new about yourself? About communication with others?
- What can be gained by utilizing positive feedback in your accomplishments?

Evaluations

Evaluations are a record, listing, outline, or accounting of what happened during the retreat. This should be written and oral. At the end the retreat, the facilitator or Chapter President should give the chapter a brief summary of what occurred during the retreat and how the ideas and goals are going to be implemented. A few days after the retreat post a written list of goals on the chapter bulletin board to serve as a reminder and checklist for future re-evaluation. Evaluating the strengths and weakness of the retreat process itself will enable future ones to be more effective. Evaluations also keep the important discussions, goals, or plans fresh in the brothers' minds. It is important to remember that the retreat is not designed primarily to solve all of your chapter's problems in one or two days. The retreat does give you the tools with which to solve the problems and carry out the goals; try to concentrate leadership efforts on the two or three major areas of concern.

How to Take Things Home

The problem with retreats is that the real world and its distractions return when you do. Any brothers who were not present may resist changes – and even some of those who were. People hate change, plain and simple.

Do not try and change everything all at once – focus on the short term, achievable targets and goals set forth in the retreat and only those goals. Small and simple steps.

Gain support from the “inside” – talk to small groups of brothers in a very informal setting about the ideas you have for strengthening the chapter and staying focused on the retreat goals.

“Pass the Gavel” – This exercise, common to the end of many chapter meetings, can be a powerful tool at the end of a retreat to truly keep brothers focused on why they were there and what they have learned. This is where everyone stands in a circle and one by one you give each member a chance to say **ANYTHING** they wish. Encourage complete and total honesty and stress over and over again that what is said in the circle **stays in the circle**. You can simply take turns speaking or to use something tangible, when somebody is done speaking, they give the salute and pass the gavel to the next person. It is very important that everyone respects the person speaking and keeps totally quiet.

Follow-up – The methods for following up outlined in Section II are important. Keep the chapter focused on its goals and the lessons learned with reminders, progress reports, and written updates.

V. ADDITIONAL RESOURCES

Retreat Planning Checklist

Pre-Retreat

- ❑ Find a date, time, and place
- ❑ Announce date, time, and place one month in advance
- ❑ Prioritize topics you want to cover
- ❑ Create a checklist of materials you'll need
- ❑ Contact an outside source to facilitate if desired
 - Alumni
 - College administrators
 - Greek advisor
 - Professors
 - FH International resource people
 - Individual members

Create a specific agenda

- Use topics listed earlier
- Leave extra time for unplanned activities
- Include business and fun
- Get as many members involved in the planning process as possible
- Assign group leaders
- Assign members in charge of meals
- Assign members in charge of recreation
- Create a phone tree for the morning of the retreat
- ❑ Arrange refreshments
- ❑ Arrange meals
- ❑ Arrange transportation for chapter
- ❑ Arrange transportation for guests
- ❑ Prepare a budget
- ❑ Prepare promotional materials for chapter
- ❑ Confirm all arrangements the day before you leave

Day of the Retreat

- ❑ Pick a place to meet and leave together
- ❑ Allow time to get settled in if retreat lasts overnight

Tips for the Retreat

- ❑ Start by asking "Why are we here?"
- ❑ Talk about the responsibility of the members
- ❑ Schedule breaks between presentations
- ❑ Groups should sit together and account for most of the discussion

Closing the Retreat

- ❑ Review "Why are we here?"
- ❑ Review goals and activities
- ❑ Review various assignments
- ❑ Get a commitment from each member
- ❑ End with the some FarmHouse songs and/or a part of the ritual
- ❑ Clean up the area

Post-Retreat

- ❑ Survey members on the effectiveness of the retreat
- ❑ Type goals and pass them out
- ❑ Send thank you letters to any presenters
- ❑ Mail agenda, goals, etc to FarmHouse International
- ❑ Follow-up on work assigned
- ❑ Save materials for your awards application
- ❑ Write thank you letters to cooks, guest speakers, etc
- ❑ Write a final report for next year's chairman

Sample Strategic Plans

www.farmhouse.org/strategic_plans.htm

FARMHOUSE FRATERNITY UNIVERSITY OF ALBERTA STRATEGIC PLAN OF ACTION 2004

Vision Statement

“To excel, within our own campus, as well as internationally within FarmHouse, to become a stronger, more unique chapter that adds to the rural diversity that we treasure and uphold. We will build the whole man, uphold the old and create new traditions, and continue to excel within our community. Leaders in our chapter will strive to reach higher levels of scholarship and recruitment, and we will be grateful for the predecessors of this chapter.”

Mission Statement

“Continue to Build the Whole Man”

Overview of Strategic Plan

This strategic plan was created by the whole chapter to provide us with a written set of goals and objectives that will be measured, and if necessary changed, in order to make us a better chapter. It will be updated annually by the entire chapter at the winter retreat, and reviewed monthly by the Strategic Plan Evaluation Committee. It will provide the new executive with a guide and a sense of direction to follow for their term. Areas needing focus are mentioned in this plan, and can change from year to year, based on the concern of those involved in the review of this plan.

External Factors Affecting Our Chapter

Pros

- Vacancy rate / cost
- Location to campus
- Secondary education becoming essential for further employment, therefore increasing university population
- ‘Dry’ fraternity
- Initial involvement on Campus

Cons

- Decreasing enrollment in agriculture program and rural population
- Fraternity image in Canada
- Lack of knowledge of fraternities
- Decreasing extra-curricular activities by students
- Cost of joining

Focus Areas

- Recruitment
- Housing
- Alumni Relations
- Greek Relations
- Community Involvement
- Scholarship

Recruitment

Key action steps	Champion	Completion Date	Measurement
1. All members in the process	Rec. Comm./ Chapter	Continuous	Members bringing potential pledges over/Size of Hotlist
2. Workshop at winter retreat	V.P. Rec. / Chapter	January 2004	Written feedback & spread of ideas
3. Maintain effective recruitment tools (e.g. Hotlist, pamphlets, etc.)	V.P. Rec.	Continuous	Ensuring recruitment tools are completed and maintained
4. Start a monthly e-mail to actives, pledges, and alumni to promote and actively recruit	Recruitment Committee	Monthly	Send e-mail out monthly and receive feedback in e-mails
5. Have 2 rush events per year	Rec. Comm. Brotherhood Social	September 2004	Number in attendance – especially potential new members
6. Initiate a minimum of 15 members in term and fill house	Rec. Committee, Whole Chapter	November 2004	Number of new initiates

Housing

Key action steps	Champion	Completion Date	Measurement
1. Summer House Action Plan	Summer House Organizer, Summer Tennant	April 1, 2004	Have plan in place
2. Implement yearly contract.	Dir. Housing, Pres.	Sept. 31, 2004	Completed contract
3. House Fix-It Day	Housing & Alumni	Twice per year	Completed, Alumni involved
4. Director House Ops Meeting	Dir. Housing	Monthly	Self-Inspection Sheet
5. Increase cost efficiency	V.P. Finance	Yearly / 9-1-04	Audit of yearly budget
6. Long – term investments into house	Assoc. Pres. Dir. Housing	Spring Association Meeting	Dir Housing meeting, review of chapter house obligations

Alumni Relations

Key action steps	Champion	Completion Date	Measurement
1. Send out newsletter 1x/ semester to 10+ other chapters, HQ & parents.	Alumni Relations	October 1 and February 1 every year	Feedback from alumni, parents, and other chapters
2. Implement an alumni event once a semester.	Officer, and designated Committee	Spring initiations and fall term	Attendance
3. Alumni Fix-it Day	Alumni Relations, and alumni volunteers	April 2004	Attendance
4. Phonathon	Organizing: Officer. Phoning: Everyone	1 week before newsletter release	Improving accuracy database and involvement

Greek Relations

Key action steps	Champion	Completion Date	Measurement
1. Host one exchange with each women's fraternity every year and one with a men's fraternity	IFC/Social	Executive turnover	Number of exchanges and attendance
2. Each active member participates in or attends at least two Greek	IFC/Social and other members	All year	Attendance
3. Assist with at least one Greek function per semester	IFC/Social	All year	Reception and attendance
4. Have a meeting with the IFC advisor every year	IFC/Social, President	End of each year	Completion and ideas brought about
5. Assist with another Fraternity's philanthropic event	IFC/Social, President	End of each year	Completion and attendance

Community Involvement

Key action steps	Champion	Completion Date	Measurement
75% of members in one other club organization	PR/Philanthropy	End of year	Attendance
Chapter completes one campus wide event per year. i.e. Turkey Trot or Anchor Splash	Sports and IFC/Social	End of year	Yes/No
95% of Chapter members provide at least 10 hrs of community service per year.	PR/Philanthropy	End of year	Attendance
Chapter has one fundraising event per year that all the profit goes to a charitable organization	PR/Philanthropy and Fundraising Committee	End of year	Yes/No

Scholarship

Key action steps	Champion	Completion Date	Measurement
1. Maintain quiet study area in the house where no other activity takes place.	Scholarship and entire chapter	Continuous	Area maintained and used
2. Punishment and reward system for poor and good school attendance.	Scholarship and Secretary	At the end of each semester	Classes missed recorded and money given to winner
3. Quiet Hours set and adhered to.	Scholarship and entire chapter	Continuous	House is quiet within specified time
4. Study Buddy system established. One pair competes against another pair.	Scholarship and entire chapter	Continuous	Buddies help each other out & competition vs. other pair
5. Award for most improved GPA	Scholarship	At the end of the semester	Award is given out

Sample Retreat Agendas

The following are sample agendas that you can reshape according to the specific needs of the chapter and time period available. Review the section on “Types of Retreats” for a more in-depth discussion about each type. The keys to having a successful retreat are advance planning and a balance of work and fun during the retreat.

Sample Officer Transition retreat agenda

Coordinator: Outgoing and incoming chapter presidents and advisors

Suggested Duration: ½ day

8:30AM	9:00AM	Gather (Light Breakfast)
9:00AM	9:15AM	Welcome
		Review of Purpose
		Review of Agenda
9:15AM	9:30AM	Advisor: What is an Officer?
9:30AM	10:30AM	Role of Executive Committee
		Overview of all Officers responsibilities
10:30AM	10:45AM	Break
10:45AM	11:15AM	Officers Pair Up to discuss specifics (Outgoing/Incoming)
11:15AM	11:45AM	Small Group Goal Setting (semester & year long)
11:45AM	12:15PM	Goal Sharing
12:15PM	1:00PM	Wrap Up
		Reflections
		FH Songs

Sample Strategic Planning retreat agenda

Coordinator: Chapter President and Director of Administration

Suggested Duration: full day

7:00PM	8:00PM	Arrival and Set-up
8:00AM	8:30AM	Breakfast
8:30AM	8:45AM	Welcome
		Review of Purpose
		Review of Agenda
8:45AM	10:15AM	Introductions: "What does FH mean to you?"
		Personal Reflection Exercises
10:15AM	10:30AM	Break
10:30AM	11:30AM	Ideal FarmHouse Man (small groups)
		Chapter in 5 years after graduation (new groups)
		Values of the Chapter
11:30AM	12:30PM	Chapter SWOT Analysis
12:30PM	1:30PM	Lunch & FH Songs
1:30PM	2:30PM	Chapter SWOT Analysis II
2:30PM	3:15PM	Mission Statement
3:15PM	3:45PM	Break / Athletic Activity (Ultimate Frisbee)
3:45PM	5:30PM	Vital Signs
		SMART Goals
		1yr goals, 5 yr goals, and Action Steps
5:30PM	6:00PM	Finalize Strategic Plan & Chapter Operations
6:00PM	7:00PM	Dinner
7:00PM	8:00PM	Wrap Up
		Reflection
		FH Songs

Sample Brotherhood retreat agenda

Coordinator: Executive Committee and/or Social and Brotherhood Chair

Suggested Duration: ½ day

8:30AM	9:00AM	Gather (Light Breakfast)
9:00AM	9:10AM	Welcome
		Review of Purpose
		Review of Agenda
9:10AM	9:50AM	Large Group Activity/Team Building Exercise
9:50AM	10:30AM	Topic Discussion: “Is it okay to lie at certain times/when?”
10:30AM	10:45AM	Break
10:45AM	11:45AM	Flag Football game
11:45AM	12:30PM	Small Group Activity (Value Shield)
12:30PM	1:00PM	Wrap Up
		Gavel Pass
		FH Songs
1:00PM		BBQ Cookout

Sample New Member retreat agenda

Coordinator: Director of New Member Education

Suggested Duration: Overnight

Pre-Day

6:00PM	6:45PM	Pledge Ceremony
7:30PM	9:00PM	Travel to Campsite
9:00PM	10:00PM	Arrival and Set-up
10:00PM	10:30PM	Dir of New Member Education: Retreat Introduction & Overview
10:30PM		Fireside Session

Day 1

8:00AM	8:15AM	Wake-up Call
8:15AM	9:00AM	Breakfast
9:00AM	10:15AM	Large Group Activity / Team Building Exercise
10:15AM	10:30AM	Break
10:30AM	12:00PM	Purpose of New Member Education Expectations of a New Member Community Service / Spiritual Activity
12:00PM	1:00PM	Lunch
1:00PM	5:00PM	Ropes Course / Team Building Exercises
5:00PM	5:45PM	Personal Silent Reflection / Journaling: Why FarmHouse?
5:45PM	7:00PM	Dinner Big Brother Program overview
7:00PM	8:30PM	Athletic Activity
8:30PM	10:30PM	Free Time / Get to know New Member Class
10:30PM		FH Songs Fireside Session

Day 2

8:00AM	8:15AM	Wake-up Call
8:15AM	9:00AM	Breakfast
9:00AM	9:30AM	Group Prayer
9:30AM	10:15AM	New Member Class Officer elections
10:15AM	10:30AM	Break
10:30AM	12:15AM	Planning / Calendaring Session
12:15PM	1:00PM	Wrap Up FH Songs

Sample Spiritual/Service retreat agenda

Coordinator: Chaplain and/or Service/Philanthropy Chair

Suggested Duration: Overnight

Pre-Day

6:30PM	7:00PM	Gather
7:00PM	9:00PM	Travel to Campsite
9:00PM	10:30PM	Arrival and Set-up
10:30PM		Fireside Session

Day 1

8:00AM	8:15AM	Wake-up Call
8:15AM	9:00AM	Breakfast
9:00AM	9:45AM	Large Group Activity / Team Building Exercise
9:45AM	12:00PM	Community Service / Spiritual Activity
12:00PM	1:00PM	Lunch & FH Songs
1:00PM	4:30PM	Community Service
4:30PM	5:15PM	Reflection on Service Projects / Personal Goal Setting
5:15PM	6:30PM	Free Time / Athletic Activity
6:30PM	8:00PM	Dinner
8:00PM	10:30PM	Discussion: Why Service? / What is Faith?
10:30PM		FH Songs Fireside Session

Day 2

8:00AM	8:15AM	Wake-up Call
8:15AM	9:00AM	Breakfast
9:00AM	10:30AM	Group Prayer / FarmHouse Bible Study
10:30AM	10:45AM	Personal Reflection
10:45AM	11:30AM	Wrap Up FH Songs

Acknowledgements

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Kappa Sigma
Triangle
Pi Kappa Alpha
Theta Chi
Sigma Alpha Epsilon
Beta Theta Pi
Sigma Chi
Alpha Chi Omega
NIC IMPACT

1. What is your favorite childhood memory? Why?

2. Who is the first person you fell in love with? Why?

3. Who is someone, whether living or dead, fictitious or real, met or unmet, that you really admire and respect? Why?

4. Who is the person in your life that brings you the most joy or happiness – someone who makes you smile every time you see them? Why?

VALUE

SHIELD

5. Who are three women outside of your immediate family that you love (use your own definition of love). What is their relationship to you?

6. Who are three men outside of your immediate family that you love (use your own definition of love). What is their relationship to you?

7. What is your most predominant value? Why?

8. What was the year you came closest to death? (spiritual, emotional, physical) Why?

9. During what year did you experience the greatest amount of personal growth, i.e. what year was most significant in terms of your development?

10. What is a date on which you made a very important decision? Why?

11. What is your definition of love? Why?

12. What scares you? Why?