

Commitment to Excellence Goal Setting Retreat

The purpose of the Commitment to Excellence program is to have each chapter create an annual cycle of goal setting, program development, and self assessment based on a comprehensive set of standards-based outcomes.

For every chapter to participate properly and receive all the benefits of the program it will need to have an annual goal setting retreat. What follows is an example of how each chapter should plan their retreat.

Things to do before the retreat:

Get a retreat leader

The archon does not need to necessarily need to be leading this retreat. One of the chapter's Angelos or a chairman whose responsibility is the Commitment to Excellence program. You can also contact an alumnus to facilitate the retreat if you think the chapter will open up around them. Whoever it is should be someone that the chapter respects and will listen to.

Find a location

It is recommended to go somewhere off campus for this retreat and at the very least out of the chapter house. The farther away you are the less distractions you will have.

Possibilities include:

- An alumnus or chapter member's family may have a location
- Campground
- College or University retreat center
- Classroom on campus (or another campus nearby)
- Hotel
- Local church, YMCA, or community center

Transportation

You need to get where you are going! Make sure you have enough brothers who are willing to drive.

You can also check Bus and train schedules or contact a charter company about transporting brothers.

Set the schedule

Below is a recommended schedule for your retreat – but depending on your chapter's specific situation (or where you are holding it) you may need to make changes.

Use the Psi U retreat guide to help improve your chapter's retreat – feel free to add in exercises to get the chapter working together and thinking outside of "the box." Also feel free to contact the International Office if you need help in doing so.

Also be sure to take time outs for meals and wellness breaks.

Get necessary items

Gather together materials needed for the retreat. Review each activity and be sure you have all the necessary items.

Be sure to print out copies of the Commitment to Excellence for each brother.

Purchase notepads, pens, and large sheets of paper for brainstorming groups and to allow brothers to take notes.

Since the retreat will take a few hours it would be a good idea to bring soda and water and also plan for snacks or a meal if necessary.

Let the chapter know about the retreat!

- Post a notice up at the chapter house
- Notify all brothers via email, since the retreat has to happen early in the semester it is important to let brothers know this is on the agenda over the summer and before many return to campus
- Mention it at meetings
- A few days before the retreat be sure to send out a reminder of the time and place and a schedule. Tell brothers to bring something to write with and reflect on ideas for the retreat. Have them reflect on the following questions:
 - o What did your chapter excel at last year
 - o Where did the chapter fail last year
 - o If you could change one thing about your chapter, what would it be?
 - o Five years from now, when you come back as an alumnus, what do you want the chapter to be like?
 - o What do you want to get out of the retreat?

Intended Outcomes of the retreat

1. Chapter learns about what resources the Fraternity and University can provide for them.
2. Chapter assesses where they want to see the chapter go and what each member can do to contribute.
3. All members are included in the process.
4. All members become familiar with the Commitment to Excellence program and contribute to setting the goals for the year.
5. Letting members all contribute in the process will help them to buy into the chapter's goals in the coming year.
6. Chapter leaves retreat with tangible action items that are recorded for future use.

Sample Chapter Retreat

(Each section is split up by time in the following manner: (section time / total retreat time)).

- 1. Introduction to the Commitment to Excellence Program & The Retreat (15 min. / 15 min.)**
 - a. Welcome everyone to the retreat and preview the day – go through the schedule step by step
 - b. Ask all brothers to turn off their cell phones
 - c. Give a brief overview of the Commitment to Excellence program (a delegate from convention can probably speak best about it).
- 2. Perfect Chapter Exercise (25 min. / 40 min.)**
 - a. The first activity helps get members to think outside the box and to dream big. Split the chapter up into groups of 4 or 5 and give each one a blank sheet of paper. Have each group come up with their criteria for what would make a perfect chapter based on what's important to them. For the purposes of the brainstorming, pretend that you have unlimited resources, time, people, and money.
 - b. After 15 minutes have each group share their “perfect chapter” with the rest of the group.
- 3. Ideas (20 min. / 1 hour)**
 - a. Place 7 paper bags around the room (or 5 boxes) and have each represent a different Program Area for the Commitment to Excellence program. Give each brother 7 index cards (or small sheets of paper). The goal is to have each brother contribute at least one idea (or statement) to each programming area.
 - b. Brothers should go off on their own and create their ideas alone.
 - c. This activity gets everyone involved and is anonymous – so brothers can put in their dreams that they may have been too embarrassed to share before.
 - d. Remind brothers to think about their “Big Ideas” – ideas that have worked in other organizations / Psi U chapters / or other Fraternities on campus; current programs that can be improved upon; paradigm shifts the chapter could make to be better set up for success and happiness.
- 4. Chapter Evaluation (45 min. / 105 minutes)**
 - a. Break the Chapter up into 7 groups and assign each group a program area from the Commitment to Excellence. Each Group should have a group leader – either an Exec member or chairman who has the closest position to the program area. The group leader should keep notes or assign a secretary to do so.
 - b. Have each Group first assess what each chapter did in the prior year towards each area. Have the group discuss what was done well / what failed.

- c. Have the secretary make a list of Strengths / Areas to improve (this will be retyped and submitted as part of worksheet #1)
- d. After a half hour gather the groups together and have each group share their list of Strengths / Areas to improve with the rest of the chapter and get feedback.

5. Wellness Break (15 minutes / 120 minutes)

6. Introduction to Goal setting (15 minutes / 135 minutes)

- a. Go over what a SMART goal is and give some general examples of what is / isn't a SMART goal.

7. Create Goals (40 minutes / 175 minutes)

- a. Have everyone return to their 7 groups and give each group the bag of ideas from the Ideas exercise
 - i. Groups should read and review each idea aloud, once that is done they should come up with any ideas of their own.
- b. Come up with a game plan for each idea the group thinks is relevant – translate these ideas into SMART goals and make each goal tangible – set who is responsible (Exec member / chairman) and set a reasonable timeline for each.
 - i. Consider what needs to be accomplished, how the chapter will accomplish it, who needs to be involved, what resources are necessary, and when it should be realistically accomplished.
- c. After they have gone through the bag and their own ideas they should then review their program area from the Commitment to Excellence program and translate their goals into the standards criteria and see if they need / want to add any other goals for the coming year.

8. Sharing the Plan (60 minutes / 235 minutes)

- a. Each chapter should take 5 to 10 minutes reviewing their goals with the entire chapter. Allow feedback / discussion for each program area.

9. Closing (5 minutes / 240 minutes)

- a. Collect all notes and goals.
- b. Let the chapter know that these notes and goals will be typed out and forwarded to the chapter.
- c. Encourage the chapter to discuss these among themselves and to not stop the process just because the retreat is over.

Things to do after the Retreat

1. Sit down with your Exec / group leaders (should be done that evening or next day).
 - a. Make a list of what worked and what didn't work during the retreat to help things along next year.
 - b. Review the goals and make sure everything is in its correct place in the Commitment to Excellence program.
 - c. Have someone type out the notes and goals from each group and email them to the chapter ASAP. You want everyone to be able to look at this document while the retreat is still fresh in their mind. Encourage discussion and ask for brothers to offer feedback to the entire chapter if necessary.
 - d. Print out a copy and post it at the chapter house if possible – keep it up year round!
 - e. Share this document with as many people as possible – Alumni, Greek Life office, International Office. Get their thoughts on it.
2. After you get everyone's feedback present the chapter's final plan at the next chapter meeting.
3. Fill out Worksheet #1 and send it in to the International Office by October 15th.