

# Retreat Guide

✦ a Lambda Chi Alpha resource



## Purpose:

The purpose of this guide is to assist you in planning and conducting your chapter's/colony's retreats. It should serve as a resource to the chapter's/colony's officer tasked with planning the retreats, preferably the High Alpha or High Beta.

In an effort for continual advancement and growth of our chapters and colonies, our members must constantly re-evaluate goals, aims, and actions to ensure they align with the overall objectives and values of Lambda Chi Alpha. This guide should provide a vehicle for your chapter/colony to do just that.

This guide is broken into four different retreats—**two different High Zeta retreats** (the Transition Retreat and the Goals Evaluation and Adjustment Review, or GEAR, retreat), **a chapter retreat**, and an **Executive Committee retreat**. For the High Zeta retreats, the transition retreat should follow officer elections and will include both the outgoing and incoming officers; the High Zeta GEAR retreat is designed to assist High Zetas as they reach the midway point in their position and begin to enter into their second half of their term in office.

This guide should be used in conjunction with the Operations Guides; Ops Guides contain additional information which may be helpful in planning your retreats. To find officer and Executive Committee Operations Guides, please visit the Document Library on Officer Portal.

## Objective of Retreats

- Foster teamwork and brotherhood among chapter/colony leaders and members
- Assist officers in understanding their duties and responsibilities
- Allow collaboration among the High Zeta in determining, evaluating, and creating officer, committee, and chapter/colony goals
- Create an opportunity to reflect on chapter/colony operations and objectives of the organization
- Encourage members to evaluate chapter operations
- Encourage non-officers to influence and contribute to officer goals and efforts
- Develop a united vision for the High Zeta and the chapter/colony based around the Seven Core Values

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**LAMBDA CHI ALPHA**

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A LIFETIME OF TRUE BROTHERHOOD

# Transition Retreat

The High Zeta Transition Retreat should occur within three or four weeks after the chapter/colony elections. The retreat creates a structured method for outgoing and newly-elected officers to meet in a productive setting. In addition to transitioning, the newly-elected High Zeta should establish its goals, plans, and objectives for the upcoming academic term. Here are a list of areas that should be covered during the Transition Retreat.

<i>Outgoing/Incoming one-on-one transition meetings</i>	<a href="#"><i>Jump to section</i></a>
<i>Review of outgoing High Zeta's Summary of Term (Note: the outgoing High Zeta will not be needed following these tasks.)</i>	<a href="#"><i>Jump to section</i></a>
<i>Evaluation of the chapter's/colony's current state</i>	<a href="#"><i>Jump to section</i></a>
<i>Review of campus, FIPG, and Lambda Chi Alpha policies and laws</i>	<a href="#"><i>Jump to section</i></a>
<i>Establishment of High Zeta goals for the upcoming term</i>	<a href="#"><i>Jump to section</i></a>
<i>Creation of a balanced budget and calendar for the term</i>	<a href="#"><i>Jump to section</i></a>
<i>Participation in teambuilding and brotherhood activities</i>	<a href="#"><i>Jump to section</i></a>

The Transitioning Retreat has many components and tasks. It may be most effective to spread the retreat over two days. A sample agenda can be found [here](#).

Over the next few pages of this guide, you will find details about each of these tasks.

# Preparing for the Transition Retreat

For the Transition Retreat to be most effective, it is important that the date, location, and agenda are set well in advance. This allows all attendees time to ensure attendance and proper preparation.

**Date:** The Transition Retreat should be no later than 3-4 academic weeks after the officers are officially installed. Remember to review the academic and chapter event calendars to ensure nothing conflicts with the date you select. The Transition Retreat is best when it is done over two days.

**Location:** High Zeta Retreats should take place away from campus to prevent attendees from being distracted, and off-campus locations also prevent attendees from having an excuse for arriving late and leaving early. The chapter/colony should select an environment conducive to a business meeting and learning environment. Some potential locations include a hotel with meeting rooms, a camp ground, and the General Fraternity Headquarters. Make sure you reserve space early and check with the High Tau to ensure the venue's cost is in the chapter's/colony's budget.

**Who should attend:** All Greek-lettered officer positions are members of the High Zeta and should be invited to participate in the retreat; this includes the High Pi. In addition, the members of the Alumni Advisory Board (AAB) should be invited. For details about the role alumni advisors play in a High Zeta Retreat, go to the [Appendix](#).

**Agenda:** It is important to set the retreat agenda well in advance to ensure all attendees know the time commitment, expectations, and any tasks they will need to complete prior to the event.

**Meals/Snacks:** All meals and snacks for the retreat attendees should be predetermined and included in the chapter's/colony's budget.

**Submit Event Planning Form:** The High Alpha or High Beta should work with the High Iota to submit an Event Planning Form for the High Zeta Transition Retreat. There should not be alcohol at this retreat and therefore the form will need to be completed at least 15 days prior to the retreat. If your retreat requires a contract, the Event Planning Form must be submitted 30 days before the event; all contracts must be approved by the General Fraternity before you or your chapter/colony may sign them. For details about completing the event planning process review the Event Planning Guide which can be found in the Document Library on Officer Portal.

# Preparing for the Transition Retreat

## Tasks for officers to complete prior to the retreat

**Goals:** Both the incoming and outgoing officers should come to the retreat with their goals. For the outgoing officers this should include an update on each goal and whether or not it was accomplished. For the incoming officer, coming to the retreat with their goals is beneficial; the overall group is then able to assist in determining the direction they hope to lead the chapter/colony.

**Review Operations Guides:** Each High Zeta officer has an Operations Guide, commonly known as Ops Guide, provided for him. This interactive document will be your go-to resource in successfully implementing the standards that your position entails. The Ops Guide contains detailed information that a new or seasoned officer should use to measure his performance and to identify goals. These operations are separated by Basic, Advanced, and Exceptional tasks.

The outgoing officer should review this in order to share any insight with the newly-elected officer about any of the tasks or responsibilities which are outlined.

The newly-elected officer should review the Ops Guide to begin understanding his position better as well as to discover any tasks or responsibilities he is unsure of to ask the outgoing officer about.

**Complete Officer Academy:** Within the first sixty days of being in office, all High Zeta officers and Executive Committee members (except the High Pi), must achieve certification on Officer Academy. It is highly suggested that each officer completes his Officer Academy certification before planning the next academic term in detail. For more information, visit [oa.lambdachi.org](http://oa.lambdachi.org).

**Chapter/Colony Feedback:** The newly-elected High Alpha should create an opportunity for the general members to provide feedback on the chapter's/colony's current operations. In addition, they should be able to share their vision for the chapter/colony going forward. This opportunity for feedback can occur through either a brainstorming exercise at a chapter retreat or simply through a survey. A sample survey can be found in the [Appendix](#).

**Summary of Term:** The outgoing High Zeta should prepare a summary of their term which will be presented to the newly-elected High Zeta at the retreat. The outgoing High Zeta should evaluate its goals and pass on the results, lessons learned, and on-going tasks to the next High Zeta to consider and build upon. [For details about this summary click here.](#)

# High Zeta, Transition Retreat - Agenda

This is a sample Transition Retreat agenda you can easily follow or adapt to your specific chapter's/colony's needs. This example is of a day-and-a-half retreat.

## Saturday, January 5, 2015

- 9:00 a.m. Depart from campus to head to Jack Mason Campground
- 10:00 a.m. Arrive at campground
- 11:00 a.m. Welcome/Kickoff/Overview of Retreat
- 11:15 a.m. Outgoing High Zeta- Summary of Term
- 12:15 p.m. Lunch
- 1:00 p.m. Outgoing/Incoming High Zeta 1:1 Time
- 2:30 p.m. Outgoing High Zeta Departs/Break
- 3:00 p.m. Teambuilding Activity
- 3:30 p.m. Evaluation of the Chapter/SOAR Analysis
- 4:30 p.m. Review University, FIGP, and Lambda Chi Alpha Policies
- 5:30 p.m. Dinner/Brotherhood Activity
- 7:00 p.m. High Zeta Officers Reflection to Determine Goals
- 8:00 p.m. Goal Sharing
- 9:00 p.m. Free Time/Camp Fire/S'mores

## Sunday, January 6, 2015

- 8:00 a.m. Breakfast
- 9:00 a.m. Establish Overall High Zeta Goals
- 10:30 a.m. Create Balanced Budget
- 12:00 p.m. Lunch
- 1:00 p.m. Create Balanced Calendar
- 2:30 p.m. Wrap up and Review
- 3:30 p.m. Head Back to Campus

# Outgoing/Incoming High Zeta One-on Ones

One of the biggest and most pivotal parts of the Transition Retreat is the outgoing/incoming officer one-on-one meetings. As you organize this retreat, you should ensure you are setting aside ample time for these to occur. Encourage the incoming/outgoing High Zeta officers to meet prior to the retreat, but if they are unable to, this portion of the retreat will ensure some kind of transition happens. If an officer has been elected to a different position, he should still serve as the outgoing officer for his previous role. It is crucial that this officer works hard not only to learn his new position but also to transition the officer taking his previous role.

Some resources you should provide the officers to utilize during this meeting include:

- Operations Guides
- Chapter/Colony Strategic Plan or Long-Term Goals
- Educational Leadership Consultant Reports
- Any Campus Accreditation Feedback

If your chapter/colony has an Alumni Advisory Board, this is a great opportunity to utilize your individual advisor. Allow them to sit in on the transitional meetings to ensure all information is passed from officer to officer.

In the back of each Operations Guide there is a transition checklist, and you should encourage officers to utilize this to guide their meeting. Here are some additional areas that should be covered.

- Status of officer goals: What were you able to complete? What was left unaccomplished?
- What was the most difficult part of the position? What was the best part?
- What is one thing you wish you would have done in the role?
- What accomplishments are you most proud of? Why?
- What information would it have been helpful to know going into this position?
- Who are some individuals I should use as a resource?
- What suggestions did the ELC provide you?



# Outgoing/Incoming High Zeta

<b>2014-2015 High Zeta Goals</b>	<b>Status</b>	<b>Notes</b>
Increased Transparency	<i>Ongoing.</i> This was a continuous effort by the High Zeta officers.	We gave goals, budgets, and strategic plan updates monthly.
Implement a functioning committee system	<i>Completed.</i> All members are currently sitting on a committee. In addition, we have been having bi-weekly committee meetings with minutes submitted to the High Gamma.	This has been an on-going goal that could easily be continued by the next High Zeta.
<b>High Alpha Goals</b>	<b>Status</b>	<b>Notes</b>
Work with the Executive Committee to create a strategic planning committee	<i>Completed.</i> The committee has developed a strategic plan. It has been reviewed by the Executive Committee and needs to be approved by the chapter.	This committee calls for semester-by-semester review of the plan to ensure it is meeting the needs of the chapter.
Implement Robert's Rules of Order in chapter meetings	<i>Ongoing.</i> Brother High Alpha presented Robert's Rule early in the semester.	The chapter could use a refresher.
<b>High Beta Goals</b>	<b>Status</b>	<b>Notes</b>
Work with all members to get involved on campus.	Incomplete. Less than 100% have joined an organization outside of Lambda Chi Alpha.	Currently 95% of the total chapter members are involved in an extracurricular activity. Still incomplete.
Plan two small brotherhood activities each month.	Completed. We were able to have two small-scale brotherhood events each month.	The High Beta delegated the planning of these small events to members of his committee. This way we offered a variety of activities that engages all members' interests.

Prior to the Transition Retreat, you should work with the outgoing High Alpha to ensure a summary is created. A blank template of this summary can be found in the [Appendix](#).

# Evaluate the Chapter's/Colony's Current State

The High Zeta should evaluate the current state of the chapter/colony. This can be accomplished by completing a SOAR analysis. SOAR stands for strengths, opportunities, aspirations, and results. This analysis is a strategic-planning tool that focuses an organization on its current strengths and vision for developing its strategic goals. The focus is on the organization and the future rather than perceived threats and/or weaknesses.

**Strengths-** What are the chapter's greatest strengths? What is the chapter most proud of as an organization? What is the chapter's proudest achievement in the last year or two?

**Opportunities-** What are the top three (3) opportunities on which the chapter should focus its efforts? How can the chapter best meet the needs of its members, campus, and community?

**Aspirations-** What is the chapter's preferred future? Reflection on strengths and opportunities conversations, as a chapter... who are you, who should you become, and where do you want go in the future? Refer back to the chapter's vision statement.

**Results-** What are the measurable results that prove the achievement of each goal?

As you are evaluating the chapter's/colony's current state, you should reference the results of your pre-retreat survey/assessment or chapter retreat – [Jump to section](#). This information will provide you a glimpse of the general sentiment of the membership and areas you should look to review and revise.

Utilize both the results of the SOAR analysis and the outcomes from the chapter assessment to guide you as you begin to set goals.

# **Review Campus, FIPG, and Lambda Chi Alpha Laws and Policies**

As a member in Lambda Chi Alpha, there are a number of different harm reduction related policies which you subscribe to. There are mandatory resolutions that have been passed by the General Assembly on topics such as Illegal Drugs, Dry Recruitment, Hazing, Sexual Harassment, Alcoholic Beverages, and Firearms, Explosives and Incendiary Devices.

As the High Alpha or High Beta, you should ensure all chapter/colony officers understand these policies. The High Zeta Retreat is a great place to educate all officers on these policies so they can assist in implementing and educating other members. In addition, it is often the High Zeta officers who coordinate events and various chapter functions. Therefore, they need to ensure each event is in compliance with all governing policies.

The High Iota is responsible for educating the chapter on these resolutions and policies. Each Mandatory Resolution mentioned above may be found in the Constitution and Statutory Code or in the Document Library on Officer Portal.

Likewise, there are other harm reduction related policies to which members of Lambda Chi Alpha submit. The Fraternal Information and Programming Group (known as FIPG) has a set of harm reduction policies to which all fraternal organizations submit, too. Once again, it is vital to educate your chapter on these policies and ensure they are met at each function sponsored by the chapter. For reference, the FIPG policies can be found in the High Iota Operations Guide or on the Fraternal Information and Programming Group's website.

Lastly, your university or college has a set of campus policies to which all registered student organizations must adhere. Check with your Fraternity/Sorority Life Adviser to obtain a copy of these policies. Once you have obtained these policies, educate yourself and the chapter on them. Simply put, a well-informed chapter is a safer chapter.

In addition, you should ensure that the High Iota has updated the chapter's/colony's Crisis Management Plan so that each chapter officer has a copy of the plan. This plan can be reviewed during this session or at a later High Zeta meeting.

Work with the High Iota to present this information to the newly-elected High Zeta during the retreat.

# Establish High Zeta Goals

One of the biggest components of this retreat is to establish goals for the High Zeta as a whole as well as goals for each individual officer. Prior to establishing the goals the High Zeta should have evaluated the chapter's/colony's current operations. This includes reviewing the previous High Zeta's end-of-term summary, the past ELC reports, and the concerns and feedback from the general members.

## Why are goals important?

Generally, goal setting means that you have a plan for the chapter and your term in office. This plan will, if developed properly, be the core around which you and your fellow officers will work as a team, and it will enable you to build greater unity within the chapter. Some of the benefits are the following:

- Better leadership results (success!)
- Improved communication
- Improved decision making
- Framework upon which to build motivation
- Improved commitment through participation
- Better use of organization – responsibilities are clarified, delegation is efficient
- Identification of problem areas
- Increased creativity and innovation

## So how do you get started on setting goals?

1. Review the SOAR analysis you completed. What are the common themes that were identified? What areas of the chapter's/colony's operations are the weakest?  
*For example: the chapter could be struggling with recruiting new members.*
2. Create an achievable plan to address the area.  
*For example: you want to establish and create a recruitment plan with a team structure to increase member involvement in the process.*
3. Determine how you are going to measure the plan. What is the desired result?  
*For example: recruitment success may be that you have 20 accepted bids for the fall semester and retain 100% of those bidded members. Additionally, 90% of members were involved in the recruitment process.*

The recruitment example just demonstrates how to establish goals. It is important to note that your goals should be SMART goals. You will find information about SMART goals on the next page.

# Establish High Zeta Goals

When the High Zeta is creating goals it is important that they are SMART.

**Specific:** Not vague or general

**Measurable:** Quantified or qualified

**Attainable:** Within the chapter's circle of influence

**Righteous:** Aligned with Lambda Chi Alpha's values

**Timely:** Reasonable deadline for action

Example of a non-specific & ineffective goal: "A stronger committee system."

Specific & more effective goal: "By the end of the term, there will be four functioning chapter committees, and every chapter activity will be coordinated by a committee."

Because the revised goal is more specific and measurable, it helps you decide if the goal was met. Setting a time when the goal is to be achieved makes the goal more meaningful. Without a specific timeline, it's too easy to say, "Someday, we'll achieve this goal."

## How can SMART goals be used to assess progress? Be SMARTER!

Making your SMART goals SMARTER will help your High Zeta set more effective goals, and will help maintain continuity, even after you leave office. To accomplish this, SMART goals should also undergo the following steps:

**Evaluate:** Assess the progress of the goal

**Revise:** Modify goal as needed

For example, if your goal was to add 25 Associate Members during the fall and spring semesters and your chapter associates 30 members in the fall semester, then your goal should be revised. Perhaps the initial goal was not challenging enough. If your goal was to complete 1,000 service hours as a chapter but you only get 900, you should examine why you missed your goal.

This can help you identify areas of opportunity in your chapter ("We aren't planning enough service projects") or areas of opportunity in your goals ("We have 20 members, and it's unrealistic for everyone to complete more than 50 hours a semester").

The Evaluate and Revise section of the SMARTER goal setting process is the evaluation of the progress between High Zeta Retreats. The High Zeta's progress should be regularly reviewed and adjusted as appropriate, and these reviews should be included in your High Zeta's summary of term. A sample template can be found in the [Appendix](#).

# Establish High Zeta Goals

As the officer corps you should create overarching goals which all officers can strive towards. These should be general High Zeta goals. These goals should align with the chapter's/colony's vision as well as the values and mission of Lambda Chi Alpha. Some examples of High Zeta goals are:

- Increased transparency
- Functioning committee structure
- New chapter website

In addition each individual High Zeta officer should create 3-5 goals they would like to accomplish within their role. These can be goals for the academic term or for the entire officer term. Just remember that the chapter/colony should host another High Zeta Retreat midway through the officer term to evaluate and adjust goals. Some examples would be the following:

- High Beta: hosting at least two small scale brotherhood events each month
- High Theta: hosting a representative from the local food bank to educate the members on their mission and how the chapter/colony can help
- High Sigma: planning and hosting a faculty and staff appreciation lunch

As each officer begins brainstorming the goals he may want to set for the upcoming term, he should utilize the following resources.

- Operations Guide
- Educational Leadership Consultant (ELC) Report
- Feedback from other members
- Results from the SOAR analysis
- Alumni Advisor

# High Zeta Officers Present Goals

Throughout the Transition Retreat, each High Zeta officer should be creating goals. These goals can be for the academic term or for the entire officer term.

The retreat facilitator should allow time for each officer to present their goals to the rest of the High Zeta. This is an opportunity to receive feedback from each other. This should be a constructive process to assist officers in fulfilling their roles and responsibilities.

Here are some ground rules for the goal-sharing process.

**Listen:** Allow each officer to share their goals and to explain them.

**Ask Questions:** If you are uncertain of a specific goal or the intended objective, ask.

**Be Kind:** Each officer has spent a lot of time and hard work in creating these goals. It's fine to provide feedback, but make it constructive.

**Be Open to Change:** If a goal varies from what your chapter/colony has done in the past, it's alright. It might be time for a change.

# Develop a High Zeta Budget

Every year, a chapter needs to consider and approve a budget that will provide funds for the necessities and luxuries of chapter operations. The variable expense items may be provided to the extent that the chapter is willing to provide additional income. No matter how large or small, a realistic budget must be considered.

Budgets may be simple or complicated depending upon the nature of the chapter's operations, and they may vary according to chapter situations. However, the important thing to remember is that there must be sufficient income to take care of the expenses.

## Creating a Balanced Budget

Each High Zeta officer should propose an officer-specific budget which covers their needs for the semester. Each officer should consider what programming, events, and administrative expenditures they intend on having for the term. Each High Zeta officer needs to plan in advance what his financial needs will be. This will help prevent problems from occurring, such as not having adequate funds toward the end of the semester/quarter.

First, the officer should create a list of events or activities that he would like to implement throughout the budget timeframe. Once the officer has developed a list of notes, he should begin to create a budget proposal. The officer should take into account the following information:

- The previous officer's budget and actual expenditures
- Chapter/Colony goals
- Officer goals
- Chapter/Colony Mission and Vision

It should be noted that the document being created is only a proposal and does not mean that the Executive Committee and/or chapter/colony will approve the budget. An example of an officer budget can be found in the appendix of each officer's Operations Guide.

As each officer presents his goals for the semester he can also present his proposed budget to receive feedback for the other members of the High Zeta.

Once all officers have proposed their individual budgets they should be collected by the High Tau to create one High Zeta budget to present to the Executive Committee for approval.



# Create a Balanced Calendar

Another task that should be completed during the High Zeta Retreat is creating a calendar of events.

A balanced calendar provides the chapter with a solid programming schedule, versus a schedule dominated by one area of operations. It is also important for all members to know their commitments well in advance to increase attendance. As preparation, each High Zeta officer and appointed position should be prepared with possible dates for his events and/or programs. The officer should also come prepared with a back-up plan if the dates they want are taken.

Keep in mind all school dates:

- First Day of Class
- Breaks/Holidays
- Formal Recruitment
- Midterms
- Homecoming
- Dead & Finals Week
- All Greek/IFC Events
- Campus Sporting Events

Have officers suggest events and programs:

- Chapter/Colony Retreat
- High Zeta Retreat
- Faculty Reception
- Parent's Weekend
- Food drive
- Chapter/Colony Awards Banquet
- Philanthropies
- Community Service Events
- Harm Reduction Education Sessions
- Pre-Initiation
- Fraternity Education Sessions
- Big Brother/Little Brother Ceremony
- Associate Member Ceremony

# Create a Balanced Calendar

- Recruitment Events
- Recruitment Retreat
- Academic Educational Sessions
- Ritual
- ZAX Sessions
- Officer Installation Ceremony
- Informal Training Session
- Academic Educational Sessions
- Social Events
- Alumni Events
- Formal
- House Clean-Up
- Educational Leadership Consultant visit
- Regional Conclave
- Summer conference (General Assembly or Stead Leadership Seminar)
- High Alpha Summit
- Officer elections

Don't forget about deadlines:

- Chapter Roster Due
- Chapter Statement Due
- Event Planning Form Due
- IFC Balance Due
- Officer Academy Certification
- Harm Reduction Report Due
- Award Applications (Campus and International Fraternity Awards)
- Feeding America Totals Due

# Teambuilding Activities

As mentioned earlier, the High Zeta Retreat should not only be focused on determining goals for the semester, but it should also serve as an opportunity to foster teamwork among the members of the High Zeta.

Serving on the High Zeta is not an easy task and can often alienate the individual officers, so it is important that the members of the High Zeta have a strong bond that encourages support and collaboration. Facilitating fun and meaningful teambuilding exercises can spark awareness of officer roles and expectations; it can also develop a deeper understanding of what it means to be a member of Lambda Chi Alpha through an experience.

As the High Alpha or High Beta, we want you to be as much a part of the High Zeta teambuilding as the rest of the officers, so it might be a good idea to ask an alumni advisor such as your High Pi or a member of the AAB to serve as the facilitator for these activities.

It is important that whoever is facilitating the teambuilding exercises has an understanding of the Lambda Chi Alpha Learning Model as this will serve as the outline for the activities. The Lambda Chi Alpha Learning Model is "Experience, Reflect, Make Meaning, and Share."

## **Experience Stage:**

As Lambda Chi Alpha brothers have experiences and complete the developmental exercise, it is vital they take time to become aware of how these experiences impact them and what thoughts and feelings are evoked from having these experiences (in this case the teambuilding activity).

## **Reflection Stage:**

Once brothers have the experience, the practice of participating in self-reflection prepares them for next steps in both Lambda Chi Alpha and life's journey. Understanding experiences can teach individuals a great deal about themselves and Lambda Chi Alpha.

## **Make Meaning Stage:**

The intention of this stage is to instill a sense of meaning in our brothers, based on "what they make of" knowledge we acquire in the new experiences they had.

## **Sharing Stage:**

As a brother has experiences and makes meaning of the experiences through the educational model Lambda Chi Alpha employs, his ability to share his experiences is the final step in the developmental journey.

For examples of teambuilding activities go to the [Appendix](#).

# Brotherhood Activity

One of the best ways to boost morale and increase chapter unity is through the use of brotherhood events. The High Beta should work with the High Alpha to build a brotherhood event or activity into the High Zeta Retreat schedule. Brotherhood events take many different forms but have some of these common features: they are for members only; the events are designed to build unity and understanding among the brothers; and there is no alcohol. Some brotherhood events feature competition between individuals or groups of brothers. Any competitions must be handled carefully. Teams should be assigned to break down barriers between cliques or groups in the chapter.

Some potential brotherhood events that could easily be added to a High Zeta Retreat are the following:

- Sporting event (playing or attending a game)
- Laser tag
- Campfire
- Cultural event (museum, art gallery, musical performance, or theatrical production)
- Ropes course
- Bowling
- Hiking
- Service project
- Card tournament
- Play board games
- Video game tournament
- Lock-in

**The High Beta will need to fill out and submit an Event Planning Form to the Office of Administration if any of the events or activities falls into one of these categories:**

- Contracts have been/will be signed with a third party vendor (rented facilities, bus company, etc.).
- The event is planned at a site more than 10 miles from the chapter house or campus.
- The event is planned to exceed more than six hours in duration.
- During a similar previous event, an accident or injury occurred.
- The total attendance for the event (including members) will exceed three times the chapter size.
- The event is co-sponsored with another fraternity or sorority.
- A third party has asked to be named an additional insured on the Fraternity's insurance policy.

# Goals Evaluation and Adjustment Review (GEAR)

The Goals Evaluation and Adjustment Review (GEAR) is a High Zeta retreat designed for midway through a High Zeta's term. The retreat does not need to be as long as the Transition Retreat, but it still does require a minimum of one day to assess where the chapter/colony is currently operating. The following tasks should take place during the GEAR High Zeta retreat:

<i>Review feedback from the general members</i>	<a href="#"><u>Jump to section</u></a>
<i>Evaluate the chapter's/colony's current state</i>	<a href="#"><u>Jump to section</u></a>
<i>Review High Zeta goals, evaluate their status (in process, completed, ongoing), and adjust accordingly</i>	<a href="#"><u>Jump to section</u></a>
<i>Create a balanced budget and calendar for the term</i>	<a href="#"><u>Jump to section</u></a>
<i>Participate in teambuilding and brotherhood activities</i>	<a href="#"><u>Jump to section</u></a>

As you continue through this guide you will find detailed information about each of these tasks, or you can simply click the "Jump to section" link.

# Preparing for the GEAR

For the GEAR High Zeta retreat to be most effective, it is important that the date, location, and agenda are set well in advance. This allows all attendees time to ensure they can attend and properly prepare.

**Date:** GEAR should be scheduled midway through a High Zeta's term. For chapters/colonies on a semester system, it is best to schedule it during the beginning of the second semester of your officer term.

**Location:** High Zeta Retreats should take place away from campus to prevent attendees from being distracted. The chapter should select an environment conducive to a business meeting and learning environment. Some potential locations include a hotel with meeting rooms, a camp ground, and the General Fraternity Headquarters. Make sure you reserve space early and check with the High Tau to ensure the venue's cost is in the chapter's/colony's budget.

**Who should attend:** All Greek-lettered officer positions are members of the High Zeta and should be invited to participate in the retreat; this includes the High Pi. In addition the members of the Alumni Advisory Board (AAB) should be invited. For details about the role alumni advisors play in a High Zeta Retreat go to the [Appendix](#).

**Agenda:** It is important to set the retreat agenda well in advance to ensure all attendees know the time commitment, expectations, and any tasks they will need to complete prior to the event. A sample GEAR agenda can be found [here](#).

**Meals/Snacks:** All meals and snacks for the retreat attendees should be predetermined.

**Submit Event Planning Form:** The High Alpha or High Beta should work with the High Iota to submit an Event Planning Form for the GEAR High Zeta retreat. There should not be alcohol at this retreat, so the form will need to be completed at least 15 days prior to the retreat. If your retreat requires a contract, the Event Planning Form must be submitted 30 days before the event; all contracts must be approved by the General Fraternity before you or your chapter/colony may sign them. For details about completing the event planning process review the Event Planning Guide which can be found in the Document Library on Officer Portal.

# Preparing for the GEAR

## Tasks for officers to complete prior to the retreat

**Goals:** Each High Zeta officer should come to the retreat with an update on the goals they set during the Transition Retreat. This update should include the current status of each goal (completed, in process, ongoing, etc.) as well as new goals or changes that you hope to implement for the upcoming term.

**Review Operations Guides:** Each High Zeta officer has an Operations Guide, commonly known as an Ops Guide. This interactive document will be your go-to resource in successfully implementing the standards that your officer position entails. The Ops Guide contains detailed information that a new or seasoned officer should use to measure his performance and to identify goals. These operations are separated by Basic, Advanced, and Exceptional tasks.

Each High Zeta officer should review his Ops Guide to determine what tasks have and have not yet been completed.

**Review the ELC Report:** Each semester the chapter's/colony's ELC issues a report on that group's operations; this report follows his visit. Each officer should review the suggestions made by the ELC and create a plan to address each one.

**Chapter/Colony Feedback:** The High Alpha should create an opportunity for the general members to provide feedback on the chapter's/colony's current operations. In addition, they should be able to share their vision for the chapter/colony going forward. This opportunity for feedback can occur through either a brainstorming exercise or simply through a survey. A sample survey can be found in the [Appendix](#).

# High Zeta Retreat - GEAR Agenda

This is a sample GEAR agenda, you can easily follow or adapt to your specific chapter's/colony's needs. This example is a one-day retreat.

## Sunday, August 25, 2015

9:00 a.m. Depart from Campus

10:00 a.m. Arrive at Lambda Chi Alpha International Headquarters

11:00 a.m. Welcome/Kickoff/Overview of Retreat

11:15 a.m. Discuss current state of the chapter (What are we doing well? Where are we struggling?)

12:15 p.m. Lunch

1:00 p.m. Teambuilding Exercise

1:30 p.m. Review Member Feedback

2:30 p.m. Review High Zeta goals

4:00 p.m. Create Balanced Budget

5:00 p.m. Create Balanced Calendar

6:00 p.m. Debrief Retreat

6:30 p.m. Formal High Zeta Dinner



# Evaluate Chapter's/Colony's Current State

A great way to start off the GEAR retreat is by discussing how the chapter/colony is currently operating. This can easily be done through a reflection activity.

## GEAR - Reflection Activity

Provide each High Zeta officer a note card. On this note card instruct the officers to write what two things went well last semester as well as the two areas that were the weakest.

As each officer shares these create a list of each of the areas that were the strongest and weakest. These can be used as you evaluate each of the High Zeta goals and assist in how to adjust or create new goals for the upcoming term.

## GEAR - Open Discussion

If you do not feel like a reflection activity would be best for your High Zeta, then you can look for other ways to evaluate how the chapter/colony operated over the last term. Here are some important areas to assess in an open discussion about the current state of the chapter/colony.

- What did we do well last term? Why was it successful?
- What areas did we struggle with? Why were they a struggle? What could we have done better?
- How do you feel we operated as a High Zeta last term? What did we do well? What areas did we fall short?
- What are the biggest opportunities going forward? What are the biggest challenges we face?

## SOAR Analysis

You can also use the same SOAR analysis which you may have utilized during the Transition Retreat. You can find details about this process [here](#).

## **Review Chapter/Colony Feedback**

As you are evaluating the chapter's/colony's current state, you should reference the results of your pre-retreat survey/assessment you asked the members to complete. This information will provide you a glimpse of the general sentiment of the membership and areas you should look to review and revise.

In addition, it can give an informal review to each High Zeta officer and how the general membership feels he is doing at completing his goals.

To view a sample survey go to the [Appendix](#).

# **Review High Zeta Goals**

The main objective of the GEAR retreat is to review the High Zeta's goals. During this retreat, you should review the overall High Zeta goals and determine how the group is doing in completing each. In addition, each officer should review his individual goals, sharing the status of each. The status can be categorized as completed, in process, on-going, or not yet addressed. This allows you, each officer, and the High Zeta as a whole, to prioritize what needs to be completed during the upcoming term.

## **Adjusting goals**

As you review each goal, you may find that some need to be adjusted; this is completely fine. Chapter/colony operations are continually evolving, and you may find the following: some goals were very easily achieved; the members easily exceeded the goal; or that some goals were much more difficult to accomplish.

## **Setting new goals**

Some High Zeta officers may have been very diligent in completing their goals set during the Transition Retreat. If this is the case, you should challenge these officers to establish new goals for the upcoming term. Remind them that the work never stops and that we can always strive to further advance our chapter/colony.

# Chapter Retreat

The chapter retreat is designed to ensure all members have the opportunity to influence the operations and direction in which the chapter/colony is heading. While celebrating brotherhood should be a focus during a chapter retreat, be sure to incorporate meaningful goal-setting activities and evaluation of the state of chapter/colony. The following tasks should take place during the chapter retreat:

<i>Reflect on previous term</i>	<a href="#"><u>Jump to section</u></a>
<i>Generate individual feedback</i>	<a href="#"><u>Jump to section</u></a>
<i>Evaluate the chapter's/colony's current state</i>	<a href="#"><u>Jump to section</u></a>
<i>Review the chapter's/colony's goals (in process, completed, ongoing), and adjust accordingly</i>	<a href="#"><u>Jump to section</u></a>
<i>Meet with committees to create goals within the Summary of Term</i>	<a href="#"><u>Jump to Section</u></a>
<i>Participate in teambuilding and brotherhood activities</i>	<a href="#"><u>Jump to section</u></a>

As you continue through this guide you will find detailed information about each of these tasks, or you can simply click the "Jump to section" link.

# Preparing for the Chapter Retreat

For the chapter retreat to be most effective, it is important that the date, location, and agenda are set well in advance. This allows all attendees time to ensure they can attend.

**Date:** The retreat should be scheduled at a time that ensures great attendance.

**Location:** Chapter retreats should take place away from campus to prevent attendees from being distracted. The chapter/colony should select an environment conducive to a business meeting and learning environment. Some potential locations include a hotel with meeting rooms, a camp ground, and the General Fraternity Headquarters. Make sure you reserve space early and check with the High Tau to ensure the venue's cost is in the chapter's/colony's budget.

**Who should attend:** All chapter/colony members should be invited to participate in the retreat; this includes the High Pi. In addition, the members of the Alumni Advisory Board (AAB) should be invited. For details about the role alumni advisors play in a High Zeta Retreat go to the [Appendix](#).

**Agenda:** It is important to set the retreat agenda well in advance to ensure all attendees know the time commitment, expectations, and any tasks they will need to complete prior to the event. A sample chapter retreat agenda can be found [here](#).

**Meals/Snacks:** All meals and snacks for the retreat attendees should be predetermined and included in the budget.

**Submit Event Planning Form:** The High Alpha or High Beta should work with the High Iota to submit an Event Planning Form for the chapter retreat. There should not be alcohol at this retreat, so the form will need to be completed at least 15 days prior to the retreat. If your retreat requires a contract, the Event Planning Form must be submitted 30 days before the event; all contracts must be approved by the General Fraternity before you or your chapter/colony may sign it. For details about completing the event planning process review the Event Planning Guide which can be found in the Document Library on Officer Portal.

# Preparing for the Chapter Retreat

## Tasks for members to complete prior to the retreat

**Goals:** Each member should come to the retreat knowing the chapter's/colony's previous goals, and he should also have brainstormed goals for the future.

**Review the Chapter Calendar:** Each member should evaluate the previous or current calendar to provide feedback on programming. This evaluation should address whether members are over-programmed or under-programmed in each area. It is recommended that each High Zeta officer should also review his Ops Guide to provide updates for the membership.

**Review the ELC Report:** Each semester the chapter's/colony's ELC issues a report on that group's operations; this report follows his visit. Each member should review the suggestions made by the ELC and create a plan to address each one.

**Chapter/Colony Feedback:** The High Alpha should create an opportunity for the general members to provide feedback on the chapter's/colony's current operations. In addition, they should be able to share their vision for the chapter/colony going forward. This opportunity for feedback can occur through either a brainstorming exercise or simply through a survey. A sample survey can be found in the [Appendix](#). Encourage members to complete the sample survey and bring it with them to the retreat.

# Chapter Retreat Agenda

This is a sample retreat agenda, you can easily follow or adapt to your specific chapter's/colony's needs. This example is a one-day retreat.

## Sunday, August 25, 2015

9:00 a.m. Depart from Campus

10:00 a.m. Arrive at Lambda Chi Alpha International Headquarters

11:00 a.m. Welcome/Kickoff/Overview of Retreat/Icebreaker

11:15 a.m. Discuss current state of the chapter (What are we doing well? Where are we struggling?)

12:15 p.m. Lunch

1:00 p.m. Team building Exercise

1:30 p.m. Review Member Feedback

2:30 p.m. SOAR Analysis Breakout Groups

4:00 p.m. Meet with Committees

5:00 p.m. Team Building Exercise

6:00 p.m. Debrief Retreat

6:30 p.m. Formal Dinner

# Evaluate Chapter's/Colony's Current State

A great way to start off the chapter retreat is by discussing how the chapter/colony is currently operating. This can easily be done through a reflection activity.

## Chapter Retreat - Reflection Activity

Provide each officer with a note card. On this note card instruct the members to write what two things went well last semester as well as the two areas that were the weakest.

As each officer shares these create a list of each of the areas that were the strongest and weakest. These can be used as you evaluate each of the chapter goals and assist in how to adjust or create new goals for the upcoming term.

## Chapter Retreat - Open Discussion

If you do not feel like a reflection activity would be best for your chapter or colony, then you can look for other ways to evaluate how the chapter/colony operated over the last term. Here are some important areas to assess in an open discussion about the current state of the chapter/colony.

What did we do well last semester? Why was it successful?

What areas did we struggle with? Why were they a struggle? What could we have done better?

How do you feel we operated as a High Zeta last term? What did we do well? What areas did we fall short?

What are the biggest opportunities going forward? What are the biggest challenges we face?

## SOAR Analysis

You can also use the SOAR analysis. You can find details about this process [here](#).



## Meet with Committees to Create an Action Plan

Once your chapter/colony has identified areas to improve, it's time to create and enact a plan. The High Beta should utilize the chapter's/colony's committee system to make this effective.

Write down all the chapter's/colony's goals for the next year where everyone can see them. Divide the members into committee breakout groups, and instruct them to create SMART goals for any chapter/colony goals that fall under their committee. A sample template for a Summary of Term for goal setting can be found in the [Appendix](#).

For an explanation and examples of SMART goals, [click here](#).

# Executive Committee Retreat

The Executive Committee Retreat is a retreat designed to set expectations and review important laws and policies prior to the beginning of a term. The retreat does not need to be as long as the High Zeta Retreats or the chapter retreat, but it still does require a minimum of one day to assess where the chapter/colony is currently operating. The following tasks should take place during the Executive Committee retreat:

<i>Reflect on previous term</i>	<a href="#"><u><i>Jump to section</i></u></a>
<i>Evaluate chapter's/colony's current state</i>	<a href="#"><u><i>Jump to section</i></u></a>
<i>Review disciplinary terms, campus policies, and General Fraternity policies with all members of the Executive Committee</i>	<a href="#"><u><i>Jump to section</i></u></a>
<i>Set officer expectations and schedule officer reviews</i>	<a href="#"><u><i>Jump to section</i></u></a>
<i>Determine criteria and expectations for big brothers</i>	<a href="#"><u><i>Jump to section</i></u></a>
<i>Review and approve the balanced budget and calendar for the term</i>	<a href="#"><u><i>Jump to section</i></u></a>
<i>Determine member recognition program</i>	<a href="#"><u><i>Jump to section</i></u></a>
<i>Participate in teambuilding and brotherhood activities</i>	<a href="#"><u><i>Jump to section</i></u></a>

As you continue through this guide you will find detailed information about each of these tasks, or you can simply click the "Jump to section" link.

# Preparing for the Executive Committee Retreat

For the Executive Committee retreat to be most effective, it is important that the date, location, and agenda are set well in advance. This allows all attendees time to ensure they can attend.

**Date:** The retreat should be scheduled prior to an academic term.

**Location:** Retreats should take place away from campus to prevent attendees from being distracted. The chapter should select an environment conducive to a business meeting and learning environment. Some potential locations include a hotel with meeting rooms, a camp ground, and the General Fraternity Headquarters. Make sure you reserve space early and check with the High Tau to ensure the venue's cost is in the chapter's/colony's budget.

**Who should attend:** All members of the Executive Committee (High Alpha, High Beta, High Tau, High Pi, At-Large Members [2], and the Alternate Member) should be invited to participate in the retreat.

**Agenda:** It is important to set the retreat agenda well in advance to ensure all attendees know the time commitment, expectations, and any tasks they will need to complete prior to the event. A sample agenda can be found [here](#).

**Meals/Snacks:** All meals and snacks for the retreat attendees should be predetermined and included in the budget.

**Submit Event Planning Form:** The High Alpha or High Beta should work with the High Iota to submit an Event Planning Form for the Executive Committee retreat. There should not be alcohol at this retreat, so the form will need to be completed at least 15 days prior to the retreat. If your retreat requires a contract, the Event Planning Form must be submitted 30 days before the event; all contracts must be approved by the General Fraternity before you or your chapter/colony may sign them. For details about completing the event planning process review the Event Planning Guide which can be found in the Document Library on Officer Portal.

# Preparing for the Executive Committee Retreat

## Tasks for officers to complete prior to the retreat

**Goals:** Each Executive Committee member should come to the retreat with goals for the Executive Committee for the coming semester. This update should include the current status of each goal (completed, in process, ongoing, etc.) as well as new goals or changes that you hope to implement for the upcoming term. This retreat would present a great opportunity to review goals from other retreats, too.

**Review Constitution and Statutory Code:** Each member of the Executive Committee should be well-versed in the laws and policies of the General Fraternity. Everyone should bring his copy of the Constitution and Statutory Code, Chapter Bylaws, and pertinent campus policies.

**Complete Officer Academy:** Within the first sixty days of being in office, all High Zeta officers and Executive Committee members (except the High Pi), must achieve certification on Officer Academy. It is highly suggested that each officer completes his Officer Academy certification before planning the next academic term in detail. For more information, visit [oa.lambdachi.org](http://oa.lambdachi.org).

**Review the ELC Report:** Each semester the chapter's/colony's ELC issues a report on that groups operations; this report follows his visit. Each Executive Committee member should review the suggestions made by the ELC and create a plan to address each one.

**Chapter/Colony Feedback:** The High Alpha should create an opportunity for the general members to provide feedback on the chapter's/colony's current operations. In addition, they should be able to share their vision for the chapter/colony going forward. This opportunity for feedback can occur through either a brainstorming exercise or simply through a survey. A sample survey can be found in the [Appendix](#).

# Executive Committee Retreat Agenda

This is a sample agenda, you can easily follow or adapt to your specific chapter's/colony's needs. This example is a one-day retreat.

## Sunday, August 25, 2015

9:00 a.m. Depart from Campus

10:00 a.m. Arrive at Marriott

11:00 a.m. Welcome/Kickoff/Overview of Retreat

11:15 a.m. Discuss current state of the chapter (What are we doing well? Where are we struggling?)

12:15 p.m. Lunch

1:00 p.m. Teambuilding Exercise

1:30 p.m. Review laws, policies, and resolutions of Lambda Chi Alpha and the campus

2:30 p.m. Review Executive Committee Goals

3:30 p.m. Set Officer Expectations and Schedule Officer Reviews

4:30 p.m. Review and Approve the Balanced Budget

5:30 p.m. Determine Big Brother Criteria and Expectations

6:30 p.m. Debrief Retreat

7:00 p.m. Formal Executive Committee Dinner

# Evaluate Chapter's/Colony's Current State

A great way to start off the retreat is by discuss how the chapter/colony is currently operating. This can easily be done through a reflection activity.

## Executive Committee - Reflection Activity

Provide each Executive Committee member a note card. On this note card instruct the officers to write what two things went well last semester as well as the two areas that were the weakest.

As each member shares these create a list of the areas that were the strongest and weakest. These can be used as you evaluate each of the Executive Committee goals and assist in how to adjust or create new goals for the upcoming term.

## Executive Committee - Open Discussion

If you do not feel like a reflection activity would be best for your Executive Committee, then you can look for other ways to evaluate how the chapter/colony operated over the last term. Here are some important areas to assess in an open discussion about the current state of the chapter/colony.

- What did we do well last semester? Why was it successful?
- What areas did we struggle with? Why were they a struggle? What could we have done better?
- How do you feel we operated as an Executive Committee last term? What did we do well? What areas did we fall short?
- What are the biggest opportunities going forward? What are the biggest challenges we face?

## SOAR Analysis

You can also use the same SOAR analysis which you may have utilized during a High Zeta Retreat. You can find details about this process [here](#).

# **Review Disciplinary Terms, Campus Policies, and General Fraternity Policies with all Members of the Executive Committee**

As a member of the Executive Committee, it is important that you are up-to-date with the laws, policies, and resolutions of the General Fraternity. Additionally, you are expected to know the details about the chapter's/colony's bylaws, and you should also know the campus's policies that could affect your membership.

Therefore, it is crucial that your Executive Committee refresh itself on these areas of legislation prior to the beginning of the semester. Some areas of the Constitution and Statutory Code to research are the following:

- Chapter minimum GPA versus individual minimum GPA
- Scholastic Probation
- Scholastic Suspension
- Financial Delinquency
- Financial Suspension
- Expulsion
- Disassociation
- Minimum Votes Required for a Bid
- Minimum Votes Required for Initiation
- Informal Disciplinary Hearings
- Formal Disciplinary Hearings
- Mandatory Resolutions
- Basic Member Expectations

Some other things to review are the following:

- The campus's policies on alcohol
- The campus's policies on formal recruitment
- Deadlines with the Greek Life office
- Necessary documents requested by the Greek Life office, student government, etc., such as event planning forms, rosters, grade releases, and insurance information

# Set Office Expectations and Schedule Officer Reviews

As an Executive Committee, it is important to regularly conduct officer reviews with High Zeta officers. These reviews are not intended to be negative. Rather, they serve as evaluating periods for officers; reviewing goals and basic expectations provides fresh insight in completed tasks and upcoming tasks. Successful officer reviews not only assist the current officers, but they prepare a forward-thinking transition process for future officers.

## When to Conduct Reviews

Officer Reviews are recommended to occur during a slow period for that officer. For example, a High Delta may conduct his officer review half-way through the academic term; not only is this a good time to evaluate what went poorly or well during recruitment efforts, but this helps him build recruitment training sessions for the remainder of the academic term. The High Phi can conduct his officer review following the Associate Member Ceremony; this takes advantage of a break in responsibilities before he is busy with rehearsing for the Initiation Ritual.

The Executive Committee Retreat is a great time to schedule officer reviews prior for the semester. During weekly Executive Committee meetings, you may include one or two officer reviews per meeting throughout the semester.

## What to Cover

When reviewing an officer, be sure to consult the officer's Operations Guide, chapter bylaws, and any pertinent campus policies that affect his office. These documents provide basic expectations for the officer. Additionally, debrief the officer's completed tasks. Here are some sample questions to guide an officer review:

- What does he deserve praise for?
- What could have gone better?
- Which tasks must he still complete?
- What deadlines are associated with his responsibilities?
- What suggestions were provided to him by the Educational Leadership Consultant?
- Are any other members/officer involved in his tasks, and are they aware of the responsibilities?
- Have any members expressed interest in this office in the future?



# Determine Criteria and Expectations for Big Brothers

When selecting Big Brothers, the High Kappa and Big Brother Coordinator should not go at it alone. The High Kappa and Big Brother Coordinator should create a Big Brother Contract to be reviewed by the Executive Committee, but the Executive Committee should establish criteria for eligibility early on.

## Basic criteria for Big Brothers

At a minimum, Big Brother candidates should accomplish the following:

- Minimum GPA requirement
- Pay General Fraternity and local dues
- Regularly attend chapter meetings and chapter events
- Attend all Big Brother training sessions
- Be in good standing with the chapter/colony and the institution

Other criteria to consider are:

- Communicativeness with the High Kappa and Big Brother Coordinator
- Completion of 1st Evolution (for Inner Circle chapters)
- Participation in the Initiation Ritual
- Knowledge of the Lambda Chi Alpha Learning Model

## Expectation for Big Brothers

All expectations should be clearly outlined in the Big Brother Contract. When reviewing the Big Brother Contract, it is beneficial to consider the following expectations:

- Attend all Big Brother training sessions
- Meet weekly with Associate Member
- Regularly report Associate Member's progress to the Big Brother Coordinator and High Kappa
- Remain in good standing with chapter/colony and institution
- Attend all Fraternity Education sessions
- Attend all ZAX sessions
- Attend a majority of all chapter functions
- Remind Associate Members of all Associate Member rights and responsibilities
- Ensure no hazing or undue expectations are imposed upon Associate Members

# **Review and Approve the Balanced Budget and Calendar for the Term**

Every year, a chapter needs to consider and approve a budget that will provide funds for the necessities and luxuries of chapter operations. The variable expense items may be provided to the extent that the chapter is willing to provide additional income. No matter how large or small, a realistic budget must be considered.

Budgets may be simple or complicated depending upon the nature of the chapters operations, and they may vary according to chapter situations. However, the important thing to remember is that there must be sufficient income to take care of the expenses.

## **Reviewing the Balanced Budget**

Each High Zeta officer should, by this time, have proposed a requested budget. As an Executive Committee, it is your responsibility to ensure that the budget balances with all other expenditure of the chapter/colony. The entirety of member dues does not go exclusively toward the High Zeta's budget, so make sure you address the items in the section below as well.

In order to approve the High Zeta's budget, they must submit line items for every event and expenditure. The officers' budgets should not be a cut-and-paste number from previous semesters; every officer has new goals that might be more or less expensive from previous terms. It is your duty to ensure that every expenditure is warranted and in line with the Fraternity's values, aims, and mission.

While approving the budget may seem like a tedious task, the Executive Committee must be diligent in approving and regularly reviewing the budget. While it is not constitutionally required, presenting the approved budget to the entire chapter/colony for a vote is measure of good faith and transparency.

## **Items that should always be in the budget**

Be sure that the budget includes the following items:

- Base Chapter Fee
- Collegiate Brother and Associate Member membership fees
- Risk Management Assessment fees
- Conclave registration and travel for at least three members of the chapter/colony
- Summer conference (General Assembly or Stead Leadership Seminar) registration and travel for at least two members of the chapter/colony
- High Alpha Summit registration and travel for the High Alpha
- Membership fees for the local IFC
- A contingency fund for rainy days; 5%-10% of the chapter's income is recommended
- Any funds needed to purchase replacement equipment or Ritual book replacements

# Determine Member Recognition Program

The Executive Committee is not solely responsible for negative aspects of chapter/colony operations. Although informal disciplinary hearings and budgetary issues are primarily determined through the Executive Committee, the Executive Committee is also charged with recognizing members for notable accomplishments.

## What should the Executive Committee Recognize?

The up-building of the Fraternity relies not only on accountability, but recognition. To encourage outstanding displays of excellence and brotherly love, it is suggested that your Executive Committee recognize the following:

- Excellence in the classroom
- Social excellence
- Volunteerism
- Assisting members within the Zeta or at other Zetas
- Representing the Fraternity in a positive, productive manner
- Great attendance
- Excellence on a committee

## What recognition can we extend to members?

Here are a few examples of recognitions:

- Grades discounts
- Housing/parlor fee discounts
- Prizes
- Trophies
- Awards at a formal event
- Free tickets for a formal event
- Choose the next brotherhood event
- Gift card
- Early dues payment discount

# APPENDIX

<i>Alumni Advisor's Role during a High Zeta Retreat</i>	<i><a href="#"><u>Jump to section</u></a></i>
<i>SOAR Analysis</i>	<i><a href="#"><u>Jump to section</u></a></i>
<i>Team Building Activities</i>	<i><a href="#"><u>Jump to section</u></a></i>
<i>High Zeta Summary of Term Template</i>	<i><a href="#"><u>Jump to section</u></a></i>
<i>Chapter/Colony Feedback Survey</i>	<i><a href="#"><u>Jump to section</u></a></i>
<i>Stay Connected</i>	<i><a href="#"><u>Jump to section</u></a></i>

# Alumni Advisor's Role during a High Zeta Retreat

As stated earlier, the High Pi and members of the Alumni Advisory Board (AAB) should be included in the High Zeta Retreat. So, what is their role at the retreat?

**Facilitator-** The chapter's/colony's High Pi, or another alumni advisor, can serve as the retreat's facilitator. This allows the High Alpha and High Beta to take a more active role in the retreat and to fully participate in the teambuilding and goal-setting activities. This also helps maintain a more serious tone and may encourage all officers to take the retreat seriously.

**Resource-** Alumni advisors serve as a great resource for the High Zeta. They are able to share past successes and struggles that the chapter/colony has had. In addition, they can provide another perspective in evaluating the chapter's/colony's current state and on the goals each officer is hoping to implement. It is important that the alumni advisors are not doing the work or dictating the direction of the chapter/colony. Rather, they are challenging the members to ensure all goals and aspirations align with the vision and values of Lambda Chi Alpha.

**Presenter-** As you begin drafting the retreat schedule, you may find that there are other topics you would like to cover that an alumni advisor could facilitate. Take advantage of the extensive experience and professional careers which our alumni advisors may be able to offer.

# SOAR Analysis

A SOAR analysis is an exercise designed to identify the current state and potential of teams, whether in a business or organizational setting. A counterpart to a SWOT analysis, a SOAR analysis encourages positive, constructive thinking to your chapter's/colony's current efforts.

SOAR is an acronym for:

- Strengths
- Opportunities
- Aspirations
- Results

If your chapter, High Zeta, or Executive Committee uses the SOAR analysis exercise correctly, you will gain a sense of clarity about where the chapter/colony currently stands, and it will expose potential improvements at which to aim in the future.

In a small group setting, encourage all members to complete their own SOAR analysis for about 10 minutes. Then, invite the entire group to share their thoughts. Be sure to write them down on a white board or flipchart paper. Identify similarities in the feedback, and eliminate answers that are too vague. Together, members who agree on the group's SOAR analysis actively work to create a shared vision for the entire chapter/colony.

# Team Building Activities

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## If You Build It

**Materials:** Building supplies such as marshmallows, pipe cleaners, or even balloons.

**Time:** The activity is very flexible and can easily fill 15-30 minutes.

**Instructions:** Simply divide the officers into teams and give them equal amounts of a certain material, like pipe cleaners, blocks, or even dried spaghetti and marshmallows. Then, give them something to construct. The challenge can be variable (think: Which team can build the tallest, structurally-sound castle? Which team can build a castle the fastest?).

### Discussion Questions:

- What are your initial reactions to this activity? Was it difficult or relatively easy? Why?
- Did your group have a plan? How did this help lead your team to the desired outcome?
- How were you or weren't you able to work as a team to accomplish the task? How could you have improved as a team?
- Did any leaders emerge? How was the plan and tasks communicated to all members? Were all members involved?
- How does this activity relate to serving as a chapter officer? How is the High Zeta like your team for this activity?

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## Jump Rope Run

**Materials:** One jump rope

**Timing:** 30 minutes is ideal for this activity

**Instructions:** The goals of the exercise is to have all officers jump in succession over the jump rope each time it hits the ground. Two facilitators, you can easily use any alumni advisors who attend the retreat, rotate the jump rope and once the first person has jumped at least one person must jump over the rope every time it hits the ground. If the rope does hit the ground without someone jumping over it or if the rope hits someone, the entire group must start over. Each officer can jump only once.

### Discussion Questions:

- How do you accomplish the task? Was it challenging? If so, how was it challenging? Which aspects?
- What role did encouragement play in this activity? What roles did practice play?
- For those at the end of the line, how did you feel when someone was successful?
- For those who have already jumped, how did you feel when someone was not successful?
- How can you apply this activity to the fraternity? How does it relate to serving on the High Zeta?
- What lessons can you as a High Zeta take from this activity?

## Magic Carpet

**Materials:** 4' x 5' piece of tarp or plastic cloth per 8-12 people

**Timing:** 30-60 minutes

**Instructions:** Have all officers stand on the tarp/cloth. Their goal is to turn the tarp/cloth over without touching the ground surrounding it. All participants must maintain contact with the tarp/cloth at all times. This eliminates the options of carrying participants on shoulders and other balance related concerns.

### Discussion Questions:

- What are your initial reactions to this activity? Was it challenging? If so, how was it challenging?
- Did you, as a group, have a plan? What was that plan? How did you do executing it?
- How could you have improved your plan?
- What role did communication play in this activity?
- How can you apply this activity to the fraternity? To serving on the High Zeta?

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## Blind Polygon

**Materials:** Large rope, blindfolds

**Timing:** This activity should take around 30-40 minutes

**Instructions:** The High Zeta members should hold a rope and standing blindfolded in a circle must use the rope to form a polygon described by the activity leader. Again, feel free to use an Alumni Advisor so all officers can participate. Examples of the polygons can be: a square, a triangle, a right triangle, a parallelogram, and a trapezoid. There are a few rules that should be followed:

1. No member of the group may let go of the rope for more than 5 seconds at a time.
2. When the group feels that the figure has been correctly formed, they may remove their blindfolds.

### Discussion Questions:

- So what did you think of this activity? How did you guys do forming the different polygons?
- Was this activity challenging? If so, what made it challenging?
- How did members of the group compensate for their inability to see?
- Did the group devise a working plan to coordinate the effort of its members?
- How did the group handle decision making?
- Would the task have been harder or easier for an individual to perform without the assistance of other members? Does this ever happen in the chapter?



# High Zeta Summary of Term Template

20__ - 20__ High Zeta Goals	Status	Notes
High Alpha Goals	Status	Notes
High Beta Goals	Status	Notes

# Chapter/Colony Feedback Survey

Please rank the following areas of our chapter/colony operations. 1 being weak and 10 being strong.

## 1. Brotherhood Programming

1      2      3      4      5      6      7      8      9      10

How could this be improved?

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What should stay the same?

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## 2. Recruitment

1      2      3      4      5      6      7      8      9      10

How could this be improved?

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What should stay the same?

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## 3. Fraternity Education

1      2      3      4      5      6      7      8      9      10

How could this be improved?

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What should stay the same?

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4. Pre-Initiation

1 2 3 4 5 6 7 8 9 10

How could this be improved?

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What should stay the same?

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5. Ritualism

1 2 3 4 5 6 7 8 9 10

How could this be improved?

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What should stay the same?

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6. Community Service

1 2 3 4 5 6 7 8 9 10

How could this be improved?

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What should stay the same?

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7. Philanthropy

1 2 3 4 5 6 7 8 9 10

How could this be improved?

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What should stay the same?

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8. Campus Relations (Administration, Non-Greeks, Other Organizations)

1 2 3 4 5 6 7 8 9 10

How could this be improved?

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What should stay the same?

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9. Campus Involvement

1 2 3 4 5 6 7 8 9 10

How could this be improved?

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What should stay the same?

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10. Relations with the General Fraternity

1 2 3 4 5 6 7 8 9 10

How could this be improved?

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What should stay the same?

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11. Alumni Relations

1 2 3 4 5 6 7 8 9 10

How could this be improved?

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What should stay the same?

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12. Chapter Involvement (Member Involvement in Chapter Events and Activities)

1 2 3 4 5 6 7 8 9 10

How could this be improved?

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What should stay the same?

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13. Member Accountability

1 2 3 4 5 6 7 8 9 10

How could this be improved?

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What should stay the same?

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14. Financial Management

1 2 3 4 5 6 7 8 9 10

How could this be improved?

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What should stay the same?

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15. Scholastic Excellence

1 2 3 4 5 6 7 8 9 10

How could this be improved?

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What should stay the same?

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16. Harm Reduction Programming

1 2 3 4 5 6 7 8 9 10

How could this be improved?

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What should stay the same?

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17. Leadership Development

1 2 3 4 5 6 7 8 9 10

How could this be improved?

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What should stay the same?

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16. Harm Reduction Programming

1      2      3      4      5      6      7      8      9      10

How could this be improved?

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What should stay the same?

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19. What area(s) should the chapter/colony focus on this year?

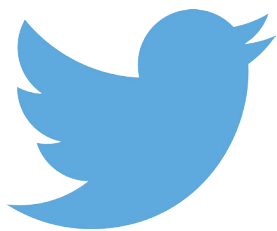
20. What area(s) should the chapter/colony focus on in the long-term? (3-5 years)

21. How can the newly-elected High Zeta officers improve from the last one?

22. What can the newly-elected High Zeta learn from the past officers and continue to do/implement?

23. Any additional notes or ideas for the High Zeta officers as they begin planning chapter and officer goals?

# *Stay Connected...*



@LambdaChiAlpha

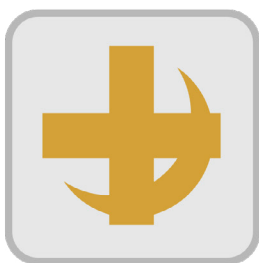


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Fraternity

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