Executive Workshop
Overview

Time: 3 hours

The Executive Retreat is an opportunity for the chapter leadership to come together as the current and elect executive boards to discuss the current state of the chapter. Through reviewing the progress made over the past year and discussing goals of the chapter, the Executive Boards should be able to complete the Chapter Success Plan and Chapter Success Plan Reflection as an outcome of the event to be turned in on time for consideration and approval by your Regional Director.

The Executive Workshop can be completed as a second half of the Officer Transition Summit to cover all necessary information that should be passed from an outgoing officer to an incoming officer. Proper transition will mitigate loss of information from one Executive Board to the next.

Objectives

- Discuss the SWOT Analysis results and implications for the chapter
- Summarize the progress of the current Chapter Success Plan
- Complete goals for the new Chapter Success Plan

People in Attendance

- Chapter Advisor
- Current Chapter Officers
- Officer-elects

Key Skills

- Analytical and Critical Thinking
- Creative and Innovative Thinking
- Decision Making
- Emotional Intelligence
- Listening and Comprehension
- Oral Communication
- Organization
- Relationship Building
Materials Needed

• SWOT Analysis Results (one per officer)
• Fraternity Calendar of Due Dates

To complete the Executive Workshop each officer should also come prepared with the following items/information. Discussion based on the provided questions will help you complete the Chapter Success Plan Review and Chapter Success Plan.

President:
- Awareness of general membership engagement during previous academic year
- Results of any chapter evaluations

Vice President of Administration:
- Previous year’s actual attendance numbers for all fraternity events (PBLI, Officer Training, Regional Assembly, The Academy, and Convention (if applicable))
- Awareness of any cohosted/collaborative events with other organizations, the university, or held with other Alpha Kappa Psi chapters
- Chapter’s official mailing address and name of university office your chapter falls under
- Committee structure

Treasurer:
- Previous year’s budget
- Awareness of chapter’s financial health and audit outcome(s)
- Current account balances

Vice President of Membership:
- Previous year’s actual recruitment numbers
- Previous year’s pledge education calendar and supplemental materials
- Awareness of the pledging program, member retention, and recruitment objectives/goals
- Previous year’s recruitment plans

Master of Rituals:
- Potential honorary initiates
- Potential faculty initiates
- Suggestions for other areas of the Chapter Success Plan
Vice President of Alumni:
- Engagement efforts made with alumni members
- Plan for engaging members as they transition to Alumnus status

Secretary:
- Current chapter calendar
- University calendar for upcoming term/year

Preparation
- The retreat should be led by the Chapter Advisor. Should the chapter advisor not be able to attend, the President should take over as the facilitator. If the President is leading, they should still participate in activities and discussions where applicable.
- Review the agenda of the Facilitator Guide to determine if the retreat needs to be broken up over multiple days or held at separate points during the academic year to accommodate election cycles.
- Provide each officer with their Officer checklist to ensure everyone comes to the retreat prepared to discuss their portion of the Chapter Success Plan.
- Be sure to build in short breaks and meals to the schedule as needed, especially if combined with the Officer Transition Summit
Welcome and Expectations (10 min)
Welcome everyone to the retreat and review the schedule and objectives of the event.

Make sure to set ground rules (i.e. no cell phones) and expectations for the event (i.e. everyone joins in on the discussion). Be sure to involve participants in setting the expectations, as if they collectively agree and help set them, they will be more engaged in the program.

Document Review (40 min)
Use this time to review the SWOT analysis the chapter completed and the Chapter Success Plan that you have been working on this academic year. Officers should also refer to the goals that were set for the current year’s Chapter Success Plan and how well they did on execution. Make sure everyone understands the direction the chapter is headed. Incoming officers who will be working on the upcoming year’s Chapter Success Plan should ask questions to understand the efforts made during the past year to attain the goals set in the Chapter Success Plan.

Questions to consider:
- What did we rate as our current strengths? Why?
- What did we rate as our current weaknesses? Why?
- What were the goals we made for this year?
- Why was that goal made?
- How well did we meet the goal?

Current Chapter Success Plan Completion and Reflection (120 min)
Participants should break into separate groups for current officers and officer-elects. For members who are part of both the current and elect boards, split evenly amongst the groups and try to spend some time with each group if possible to discuss their role.

Current officers will work on completing the Chapter Success Plan Reflection. Providing thoughtful and thorough responses will be useful in assisting future E-Boards in understand the initiatives of the chapter and what realistic expectations they should have based on what was able to be accomplished. Once the Chapter Success Plan Reflection has been completed current officers should join officer-elects to assist in completing the Chapter Success Plan for the upcoming year.

Officer-elects should start working on the Chapter Success Plan for the upcoming year. After having reviewed the current Chapter Success Plan officer elects should understand how to complete the form. Each officer is responsible for a portion of the form and must have their planning materials with them. Whether the Chapter Success Plan is completed within this two-hour session or not, officer elects will
want to provide thoughtful and thorough responses to lay the clearest plan possible to follow during the upcoming year.

**Questions to consider:**

- **To the current Executive Board –**
  - How can we use the results of the SWOT and knowledge of the current Chapter Success Plan to complete the Chapter Success Plan Reflection?

- **To the elect Executive Board -**
  - How can we use the results of the SWOT and knowledge of the current Chapter Success Plan to complete the new Chapter Success Plan?
  - What dates do we need to consider as we start to develop the calendar? (officer-elects)

- **What individual goals did we have planned for our officer roles?**
  - How do they relate to the results of the SWOT analysis and progress on the current Chapter Success Plan?
  - What goals do we want to focus on?
  - What would help us succeed in meeting our goals? What could hinder us from meeting the goal?
  - How can we address the Opportunities or Threats we identified in the SWOT?
  - How do we prioritize what we want to accomplish?
  - What is most important to accomplish in the short term? In the long term?
  - What would our chapter look like if we met all of our goals?
  - What would our chapter be like if we met none of our goals?

**Wrap-up and Expectations (10 min)**

Have each officer reflect on and share their key takeaways from the workshop. If the workshop was held in conjunction with the Officer Transition Summit each officer should also reflect on their takeaways from the transition and set up any additional one-on-one training as needed.

A reminder that if the Chapter Success Plan Reflection is not completed during the Executive Retreat it must be completed and submitted by May 1st for semester schools and June 1st for trimester/quarter schools. Chapter Success Plans for the upcoming academic year are due on May 15th for all schools. Determine a time when you will meet again or a delegate who is responsible for the remaining section(s) and assign a deadline to have in completed for chapter review prior to the official May 15th deadline.