Chapter Retreat Planning In-Depth

Prior Planning

Location:
If possible, find an offsite location. Suggested sites might include your state pharmacy association’s headquarters (if not too far from your campus), a public library or community center with private meeting rooms, a local hospital pharmacy’s meeting or conference room. Often these could be made available to your Chapter at no charge, and it would provide your officers with different surroundings than their typical executive committee meetings. This can be quite valuable in setting the stage and focusing their energies for concentrated work to be accomplished.

Length of Time:
Varying time windows can yield effective retreats. Plan for at least a 4 hour retreat (morning, afternoon, or early evening). Some Chapters hold their retreats all day on a Saturday. Others have gone offsite for a weekend: beginning with ice breakers and some initial work Friday night, sessions all day on Saturday, and departing after lunch on Sunday. Different plans will work better or worse for different Chapters. Tailor a framework that works best for your officers.

It is important to remember that considerable energy will be expended during the process -- be sure to schedule meals, breaks, and even “timeout” periods. This can help to maximize productivity.

Timing:
Consider test schedules, holidays, etc. when planning the day and time for the retreat. [Friday from 4:00 to 8:00 pm after a week of exams (often complete with “all-nighters”) might prove to be non-productive]

Retreats are often held annually. One Chapter may prefer to retreat in the spring -- to evaluate the activities of the current year and beginning work on a plan for the next school year. Another might retreat in the fall for the next Achievement Award year (calendar year). Retreats are often effective when held shortly after new officers’ elections and installation. Discuss what time of year might be most effective for your Phi Delta Chi chapter needs.

Process:
The coordinator/facilitator (often the WCC) should distribute agenda topics ahead of time so participants can begin formulating ideas prior to the retreat. Ask for input also.

It is important to have a printed agenda for the meeting -- however vague (i.e. for brainstorming) or detailed it might be. Know what you want to accomplish before you begin!

Who should be included:
Most Chapters that hold retreats include all Brothers. The advisors usually participate, but to varying degrees. Some Chapters have the advisor participate throughout the entire retreat. Others schedule some amount of time for the officers to hold discussions on their own -- usually the advisor has participated to some extent. (It is helpful to include the Advisor to establish mutually agreed-upon advisor participation expectations).
Chapters with active memberships exceeding 30 Brothers may have a Chapter Officer retreat instead of a chapter retreat. In this case, consider including committee chairs and vice chairs. Again, different settings work well from school to school and even one year to the next.

If you’re just getting things moving again with your Chapter, try to keep your numbers and plans manageable. Be patient. Even Phi Delta Chi Chapters that are extremely active today were, at some point, relatively inactive -- and rebuilt over time.

**Strategic Planning Within the Retreat**
The retreat marks the beginning of the chapter’s strategic planning process. Nominal group process is a very effective way to operate a retreat. As discussion begins, have participants write down ideas, items, and projects they wish to consider. One by one, go around the room and have participants name items from their lists -- write these on a board, flip chart, or overhead, and continue around the room until everyone’s list items have been mentioned. (During this process, there is no discussion or debate on the topics -- only listening.)

Once the list is compiled, have the group prioritize each project or item. Then begin discussions and planning. This assures everybody's ideas have been brought up (prevents a less assertive individual’s ideas from being overlooked when more aggressive participants dominate the discussion). The final, prioritized list is a consensus, and thus has buy-in from each participant.

Other topics to be sure to consider are:

**Chapter goals and objectives:**
Chapter officers need to discuss what they want to accomplish before they can decide how to move forward.

**Assess current status of Chapter:** Use the chapter standards as a tool to gauge chapter strengths and weakness. Seek root causes of less desirable areas. Review the past Achievement Award total sheets and Thurston Cup total sheets to gauge status.

**Chapter finances:** Discuss global directions to provide direction to the Development team. The Executive Committee should convene immediately following the retreat to incorporate retreat generated activities and associated costs to further guide the Development team.

**Phi Delta Chi:**
Review the Fraternity's mission and goals and determine (or remind) the group of how the Chapter fits into the regional and national structure. Explore ways you your Chapter can affect change through the policy and resolutions process. Illustrate opportunities for chapter Brothers and officers to develop their leadership abilities and professionalism. Demonstrate how Phi Delta Chi can expand their exposure to pharmacy in all areas of practice.
Membership:
What do the officers perceive as benefits (including intangibles) of membership in Phi Delta Chi? Thinking about and articulating perceived benefits will help membership drive efforts when speaking to prospective members (and will provide sound direction for the membership committee to consider as it is established). Identify resources required for successful recruitment and determine how the Phi Delta Chi National Office might facilitate your efforts. Create sound recommendations and forward them to the National Officer for consideration.

Membership recruitment is important; however, make sure that it does not overshadow the retreat, allowing adequate time to set the agenda for other activities.

Bylaws:
If your Chapter does not have bylaws, or if they cannot be located, it is imperative that some be drafted. Contact your regional team if you need assistance. It may be helpful to appoint a Bylaws Committee to accomplish this task. Bylaws are a crucial part of ensuring your Chapter operates fairly and efficiently.

Achievement Award:
Is your Chapter filing regular reports to the National Office, in the form of the Achievement Award Program? These reports help the Regional Team and the Executive Council know how each Chapter is operating and what it is doing in its community. They also qualify each Chapter to be recognized at the Phi Delta Chi Achievement Awards presentation for completing projects, participating in meetings, etc. Toot your Chapter’s horn! This also provides the Grand Vice Presidents of Collegiate and Student Affairs with ideas and experiences that can be shared with other Phi Delta Chi Chapters.

Committee Structure:
Evaluate your committee structure as it currently exists. Are the committees effective? What services are they providing? Can they be improved? What other projects could they consider? Is each one still necessary? Do you need more?

Chapters vary from having few or no committees to having in excess of 20! Quantity is not important. What is important to consider? Is your Chapter able to accomplish its goals with your existing structure? What changes (if any) over time might be necessary to facilitate your activities? This will change from year to year as the needs and interest of your Chapter, school, and community change.

Once you have your committee structure in place, you can begin to plan the projects that you would like to accomplish for the year. There are no hardset rules to follow in organizing a project. Different projects, areas, people, etc. all require different methods. One thing is sure: with proper leadership and planning, almost any program can be a success.

Executive Committee Structure:
Although it may require a change in bylaws, circumstances may present a need to add another officer to the Executive Committee or to change the nature of an existing office.
Other organizations on campus:
Your Chapter should strive to work with other specialty organizations and fraternities at your school on projects and events. Building positive working relationships with the other organizations strengthens projects and minimizes separation of your student body. Work together for a cooperative, non-antagonistic, environment, which will position the Chapter as a premiere organization on campus. Other Fraternal organizations will pale in comparison, which will facilitate membership recruitment.

Proactive Chapters position themselves to permeate the entire college/school of pharmacy environment and become involved with other campus organizations. Leadership development is a function of Phi Delta Chi, but the Fraternity itself is not constrained to an organization status. Phi Delta Chi transcends other organizations by creating and nurturing leaders and not just recognizing them, such as is the case with organizations such as Phi Lambda Sigma, for example.