



*COMMITMENT TO
EXCELLENCE*



Psi Upsilon

Mission

United in friendship, Psi Upsilon members aspire to moral, intellectual and social excellence in themselves as they seek to inspire these values in society.

Values

Lifelong friendship

Psi Upsilon unites its members in a diverse brotherhood of firm and enduring friendship that will last a lifetime.

Moral leadership

Psi Upsilon's system of self-governance nurtures development of mature decision-making, individual responsibility and moral leadership.

Intellectual engagement

Psi Upsilon fosters individual and chapter support for the academic mission of the college and creates opportunities for co-curricular learning and personal development.

Responsible social conduct

Psi Upsilon's members are guided by principles of responsibility, civility and courtesy.

Service to society

Psi Upsilon encourages service to college, community, country and Fraternity.

Dear Brother,

Thank you very much for taking interest in the *Commitment to Excellence* program. This curriculum grew from our office being challenged to find a better way to support the chapters and create meaningful, productive ways for alumni and advisors to interact with undergraduate membership. Every chapter of Psi U needs to be setting goals for itself if it is going to achieve any sort of success, and alumni assistance can be invaluable to the process.

Like most fraternities, Psi Upsilon primarily relies on leadership academies, consultant visits and resource manuals to help guide the direction of our chapters. These resources are all effective in their own way, but alone they don't provide ample support to the challenges chapters' face on a regular basis. We knew we had to better connect alumni with undergraduates in meaningful ways. Prior retreats were built around chapter operations and gave specific guides, and while supportive, they did not have the impact we always wanted. Whether it was volunteers and undergraduates not understanding one another, chapters not being able to prioritize needs, or institutional operations being too particular it was evident that we needed to move away from what separates brothers and chapters, and instead focus on what binds us together. The mission of Psi Upsilon has always given us purpose: *United in friendship, Psi Upsilon members aspire to moral, intellectual and social excellence in themselves as they seek to inspire these values in society.* By focusing on our "why" we are changing the conversation and focusing on what is important, instead of getting lost in operational tasks. By using the values of our fraternity: lifelong friendship, moral leadership, intellectual engagement, responsible social conduct, and service to society, as our guides we will build better, relevant, goals.

There is an old adage, "A goal without a plan is just a wish". The *Commitment to Excellence* program also allows brothers to assess the current performance of the chapter. Without this reflection, it is impractical to create a plan to move forward. We also know follow up is essential, and have created supplemental curriculum to be held at a later date as the chapter progresses. The most essential part of the program is YOU. Without oversight of the chapter's plan, goals will not be achieved.

I would be remiss to not mention Dan Wrona and his team at RISE Partnerships. While volunteer and staff time went into building a rough program we needed his professional expertise to fully flesh it out and the *Commitment to Excellence* would not exist in its present form without his hard work.

Please let us at the International Office know how to assist you and your chapter better, and give us feedback on this program. Our team is there to help support your efforts. We thank you again for your interest in the *Commitment to Excellence!*

Yours in the Bonds,



Thomas Fox

Executive Director, Psi Upsilon Fraternity



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DESIGN SUMMARY

Purpose

The goal-setting retreat supports chapter leaders in continuously improving their organization. It engages members in shared problem-solving, identifying opportunities for improvement, and aligning the organization with its mission and values. The retreat is supplemented by an administrative system that helps volunteers and staff maintain follow-through, provide additional support, and assess results.

Features

Volunteer Facilitation

Curriculum relies mostly on guided group discussion with minimal presentation and teaching, making it easy to lead for facilitators with limited presentation experience.

Pre-Session Assessment

Prior to the retreat, chapter leaders document the activities of the past year and conduct a performance assessment through the lens of Psi Upsilon's values.

Group Development

The collaborative problem-solving process allows members to identify and work through problems together so they leave the session as a better organization with shared goals.

Chapter Development Formula

Participants use a capability building model with the formula, "Capability + Effort = Performance," to analyze the organization and identify opportunities for improvement. This allows the group to focus its energy on the long-term health of the organization rather than short-term initiatives or isolated functional areas.

Officer Work Session

Chapter leaders meet separately after the retreat to refine their ideas into detailed action plans, which will be shared with stakeholders who can provide follow up support.

Supplemental Workshops

Additional workshops can be offered to guide members in addressing specific issues affecting the chapter's capabilities in order to help them continually improve their performance. Although there is a small educational component, the session primarily focuses on group development rather than traditional training.

Specifications

Format

The program involves approximately 7 hours of content facilitated through a full-day work session. It accommodates between ten (10) and one hundred (100) participants, and all members should be in attendance. Curriculum follows an institute-style format, where each element builds upon previous content. The program should take place in a meeting space with moveable seating and additional space for participants to move around. Avoid fixed desks and auditorium, tiered, or theatre-style seating. No audio-visual resources are necessary, with the exception of chart paper, easel, and handout materials.



Learning Outcomes

Members will be able to demonstrate the following outcomes as a result of participating in the retreat:

- Articulate a thorough, honest assessment of the chapter's current performance and capability
- Explain the framework for chapter improvement
- List personal contributions they plan to make to improve the chapter
- Feel a sense of ownership in the chapter's plan, as indicated by:
 - Listing specific action steps they plan to implement
 - A sense of personal responsibility for carrying it out
 - Feeling confident that they will follow through
- Officers list priorities and strategies for improvement from memory

In addition, the chapter should experience the following outcomes as a result of the retreat:

- Increased follow-through as defined by the percentage of initiatives completed in the year following the retreat.
- Improved health, as indicated by growth in priority capability areas
- Improved performance, as indicated by greater alignment with values of the chapter

Materials

- Writing utensils for each participant.
- Approximately five (5) Post It® sheets per participant. Super sticky versions are recommended.
- Completed Chapter Performance Worksheets
- Eleven (11) pieces of chart paper
- One (1) roll of blue painter's tape if chart paper is not adhesive
- Five (5) markers
- Five (5) copies of the Evaluating Performance questions
- One (1) copy of My Contribution / My Commitment questions for every two (2) participants
- Five (5) copies of the Capabilities Analysis Worksheets
- Three (3) to six (6) colored stickers per participant (such as Avery® Round Color Coding Labels - #5050)
- Three (3) index cards per participant

Curriculum Summary

10:00 - 10:30 am **Opening Activity**

A group activity prepares members for open discussion and critical thinking.

10:30 - 11:45 am **Chapter Review**

Chapter leaders review the activities of the past year and complete a self-assessment of the chapter's performance according to Psi Upsilon values.

11:45 am - 12:30 pm **Lunch Break**

12:30 - 2:00 pm **Capabilities Analysis**

Participants learn a formula for organization development, use it to evaluate the chapter, and identify opportunities for improvement.

2:15 - 3:30 pm **Prioritization and Action Planning**



Through a crowd-sourced rating activity, members set their priorities for the year. They identify potential action items in groups, then create a chapter-wide affinity web to organize action plans. The facilitator then discusses next steps and leads a closing exercise asking members to take individual responsibility.

3:45 - 5:00 pm Chapter Leader Work Session

Chapter leaders reconvene with the facilitator following the program to refine the retreat result into detailed action plans.



FACILITATOR NOTES

Role of the Facilitator

As the facilitator, your role is to guide participants through an experience that will help them address the issues they are facing. The success of each retreat will not come from delivery of the content, but from the reflection, discussion, activities, and commitments that members share with each other. As a facilitator, your responsibility is to create this environment, introduce activities, and ask thought-provoking questions, while letting participants reach their own conclusions. It should go without saying, but as a facilitator, you will not play the role of a presenter, a teacher, a parent, a supervisor, or an advisor.

Retreat Design

The retreat outline is intentionally designed to help members naturally reach the objectives identified. It follows an institute format, meaning that each component builds upon the next, and every member experiences the same process. This means that individual sections should not be skipped or switched, and all members should be present throughout the experience.

Retreats involve a variety of experiences, including personal reflection, presentation, group discussion, and small group exercises. The format varies throughout the day in order to maintain energy and strengthen learning outcomes.

At times, the experience may feel slow, complex, chaotic, challenging, or frustrating; this is to be expected, and in most cases, it is intentional. When you find yourself in these situations, trust that the curriculum will help participants work through the issue and reach the intended outcomes at the end of the day.

Small Groups

Participants will work in small groups multiple times during the retreat.

An important goal of any chapter workshop is for members to develop a stronger connection to one another. However, if members continually work with the same group of people, divisions within the organization become exaggerated. Each small group should contain a mix of participants according to seniority, class year, influence, cliques, majors, and other variables. To accomplish this, form new groups using either random assignment, asking participants to work with those whom they interact least frequently, or encouraging them to include representatives from different class years, new member classes, officers, majors, teams, or other potential cliques in each group.

Involvement of Alumni

When alumni attend the retreat, incorporate them as an active participant in the experience alongside members. They should play the role of an advisor or mentor. Encourage them to be fully present and to provide guidance where it is requested. When tempted to either observe from the back of the room or to dominate the conversation, they should instead seek balance.

Workbooks and Supplemental Materials

The retreat involves the use of supplemental materials such as worksheets, quotes, and other resources. Worksheets help teach information, give participants a place to reflect, and facilitate follow-through on the retreat's take-home lessons. As the facilitator, prepare these materials in advance of the program, and verify that you have everything you need.

Code Key

The symbols and formats below are used to help facilitators follow the curriculum.

- ☐ Checkbox provides notes, instructions or reminders to the facilitator
- ☁ Word cloud means the facilitator is saying this statement aloud.



- Regular bullets offer added details about points to make and responses to expect.
- ? Question mark bullets indicate discussion questions to ask of participants
 - ▶ (5/15) This timing mark indicates that the activity takes five (5) minutes to complete, and that when complete, approximately fifteen (15) minutes should have passed during this section.

Creating the Environment

This retreat requires an environment of seriousness, honesty, and focus. Remind participants through communications in advance, during preparations, and when introducing the retreat to take it seriously and invest their full energy in order to gain as much as possible.



OPERATIONAL PROTOCOLS

Facilitator Training

Alumni or volunteers who are new to this program will follow the outline below to prepare for facilitating a chapter retreat. This should take place over approximately a two-week period.

Study Materials

Facilitators should review this document and watch the short recorded video session available here:

<http://www.psiu.org/?Commitment>.

Video Session Outline

- Function of the program in the organization
- Purpose and goals of the program
- Program design and description
- Role of the facilitator
- Facilitator skills: Critiquing Ideas
- Facilitator skills: Making Connections
- Chapter development framework
- Action Planning Workflow
- Supplemental Workshop

Program Preparation

After reviewing materials, facilitators should answer the questions below to better understand the program and better prepare for their first session.

- How would you define a successful program?
- What would it look like for the program to go well?
- What issues would you predict could make the session go horribly? What might you do to prevent this?
- How would you handle a situation where the chapter does not want to work on the issues that you think they need to work on?
- How do you see the chapter development framework applying to your organization?
- What additional information do you need in order to facilitate a successful program?

Program Review

After completing the reflection questions, the facilitator will meet with staff to review content. This conversation should address the following items:

- What questions do you have about the contents of the program?
- What part of the program are you least comfortable with?
- What personal experiences can you bring forth into the curriculum? Discuss appropriate levels of sharing.
- Review the definition of success.
- Discuss background information about the chapter including historic program results.
- Review program logistics.



Preparation Checklist

One Month in Advance

- Confirm the location, date, and time of the program.
- Check on possible scheduling conflicts (sporting events, campus activities, or fraternity/sorority life programs).
- Get contact information for the chapter president and an emergency contact.
- Send announcements and information to chapter members.
- Task leaders with completing the Chapter Performance Worksheet with a deadline of one week before the event.
- Make travel arrangements, including flight, ground transportation, parking, and directions.
- Work with the chapter president to coordinate lunch plans for program participants.

One Week Prior

- Send a reminder to participants with event details.
- Confirm that the location and audio/visual resources are secured.
- Verify the anticipated number of attendees.
- Print handouts.
- Pack materials and supplies for the anticipated number of attendees, plus five (5) percent.
- Collect the completed Chapter Performance Worksheet from chapter leaders.

On-Site Before the Retreat

- Arrive early to set up the meeting room.
- Work with those in attendance to send text reminders to participants if they run late.
- Confirm that you have all the materials you need for the day.
- Arrange the room in one circle for a small chapter (fewer than thirty (30) participants) or in rows of chairs for a larger number of attendees.

During the Retreat

- Capture pictures of completed chart paper for posterity.
- Post highlights of the day to social media.

Immediately Following the Retreat

- Save completed Planning Worksheets if not submitted electronically.
- Clean up and rearrange the room to its original condition.

Ongoing Chapter Support

- Completes any follow up steps to which you committed.
- Submit notes and action plans if not delivered electronically.
- Staff members review chapter action plan results electronically, and incorporate it into chapter performance dashboard.
- Facilitator and staff contact debrief the retreat and identify any ongoing support needs.
- Facilitator and/or staff contact make arrangements for follow up workshops or resources
- Both staff members and the facilitator check in with the chapter at scheduled times.
- The facilitator and/or staff provide additional training on the following topics, as relevant.
- At the conclusion of the semester following the retreat, headquarters staff schedule a call with chapter leaders to assess whether initiatives were completed and whether capability improved and was retained.



PRE-RETREAT CHAPTER PERFORMANCE REVIEW SESSION

Description

- The activity below should be completed by chapter leaders in preparation for the chapter development retreat.

Timing

- 60 minute session to take place at least one week prior to the retreat.

Audience

- Chapter Leaders

Materials

- One (1) copy of each Chapter Performance Worksheet

Instructions

- Distribute worksheets to officers, and ask them to read the description of Psi Upsilon's value statement at the top.
- As a group, review the chapter's calendar from the past year including every event, initiative, and activity that members participated in or led. Use the categories below to prompt ideas:
 - Chapter Management
 - Recruitment
 - New Member Education
 - Educational Programming
 - Ritual
 - Scholarship
 - Service and Philanthropy
 - Risk Management
 - Campus and Interfraternal Leadership Programs
 - Alumni Relations
 - Social Activities
 - Athletics
- As you list each activity, write its name in the left column if it fulfills the value designated on the worksheet. Initiatives may apply to multiple values (e.g. a service event that involves tutoring at-risk high school students could apply to intellectual engagement, responsible social conduct, and service to society).
- Rate the success of each activity by giving it one (1 = highly unsuccessful) to five (5 = highly successful) stars.
- Add a note to explain your rating.



- ❑ Send the results to the facilitator, and bring completed copies of the worksheet to the retreat.
- ❑ Assign each value to one chapter leader, who should present a summary of the chapter's performance of this value during the retreat.



WORKSHOP CURRICULUM

Opening Activity

Timing

- 10:00 – 10:30 am

Learning Outcomes

- Participants feel comfortable having open and honest conversation with one another
- Participants understand and agree with expectations for the session

Materials

- Approximately five (5) Post It® sheets per participant. Super sticky versions are recommended.
- Writing utensils for each participant.

Setup Notes

- This activity requires space for participants to move around and a wide, relatively flat wall to post the chapter timeline. Select which part of the room you plan to use for this in advance, and make sure the space is cleared.

Outline

Welcome Participants (5 minutes)

- ❑ Introduce yourself.
- ❑ Thank participants for attending.
- ❑ Begin immediately with the group warm up activity.

Group Activity (20 minutes)

- ❑ Distribute Post It® notes and writing utensils to participants. Each individual should have about five (5) slips of paper.
- ❑ Introduce the activity:
 - 🗨 In preparation for our work today, it would be helpful to first look back on the past year. We need to bring to mind all of the events, stories, achievements, failures, missteps, and other important experiences we had.
 - 🗨 On each Post It® note, write down one memorable experience that you think is important in telling our story of the past year. Some of these should be funny, some should be serious, some should be heartfelt, and some should be challenging.
 - 🗨 Work on this privately for yourself, and keep in mind that your brothers will also be sharing their moments, so try to think about the things not everyone would share.
- ❑ Give participants about five (5) minutes to work on this.
- ❑ After about five (5) minutes, continue to the next part of the activity.



- ☞ Now that you each have thought about the most important moments of the past year, it is time to see the results. To do that, we are going to imagine that the wall is a timeline. On far left side is this time last year. On the far right side is today.
- ☞ In a moment, when I tell you to move, place the events you identified on the timeline relative to the approximate time they happened. The timing does not need to be perfect.
- ☞ When you are finished, remain standing so you can see the entire timeline.
- Give participants about five (5) minutes to construct the timeline.
- After five (5) minutes have passed, ask participants to gather around their timeline to observe the result.
- Select an event at random from the left (past) side of the timeline, ask a participant to share a brief (ten (10) second) reminder about what happened, and ask why they thought it was important.
- Repeat this process, working from left (past) to right (present), for a total of about ten (10) important events evenly distributed across the timeline.
- When you are finished, ask participants the following questions:
 - ? Based on this review, how do you think the year went?
 - ? As we plan for next year, are there other highly notable things that I skipped and that you want everyone to remember?
 - ? If there is one lesson we could pull into next year, what is it?
- Thank participants, and ask them to take their seats.

Introduce expectations (5 minutes)

- Welcome participants again to the session.
- Share the outline for the day, including:
 - The morning will focus on analyzing our performance, and we will explore opportunities for improvement in the afternoon.
 - After the retreat, officers will convene to translate your recommendations and ideas into the final action plan.
 - There are regular breaks built into the retreat.
 - We will stop around noon for lunch.
- Share expectations for the day, including:
 - ☞ This is an interactive discussion, and each person will need to contribute.
 - ☞ Our ability to succeed is directly related to our willingness to have an open, honest conversation about our chapter and how we operate.
 - ☞ Your role is to work together to chart the course of the chapter. My role is that of facilitator, meaning that I am here to:
 - Help the discussion run smoothly and remain on track.



- Point out problems and issues that you may need to address.
 - Challenge you to address issues you may want to avoid.
 - Help you make decisions, rather than making decisions for you.
- ❑ Share any additional expectations that you believe are relevant.
 - ❑ Ask participants to share any additional expectations they have for the event.



Chapter Performance Self-Assessment

Timing

10:30 - 11:45 pm

Learning Outcomes

- List successes and failures from the past year
- Articulate a thorough, honest assessment of the chapter's recent performance

Materials

- Completed Chapter Performance Worksheets
- Five (5) pieces of chart paper
- Five (5) markers
- Five (5) copies of the Evaluating Performance questions
- One (1) copy of My Contribution / My Commitment questions for every two (2) participants

Setup Notes

- Determine which chapter leaders are presenting the results of the performance assessment. Check in with them prior to this segment to ensure that they are prepared.
- List Psi Upsilon's values on chart paper.

Outline

State of the Chapter (30 minutes)

- Referring to the five (5) fraternity values listed on the chart paper, discuss the importance of using values to assess chapter performance:
 - ☛ We exist for the purpose of carrying out our values on campus and in the surrounding community.
 - ☛ Because Psi Upsilon is governed by these values, they should serve as our primary measures of success. Anything we do to improve the chapter should lead to better results in these areas.
 - ☛ We carry out these values by leading educational programs, service activities, academic improvement programs, recruiting and developing new members, connecting with alumni, and more.
 - ☛ It is tempting to evaluate your chapter based on functional areas such as recruitment, alumni relations, etc., but these are simply means for achieving an end. We should actually be evaluating ourselves on the real goal: bringing our values to life.
 - ☛ During today's session, we will use these values to evaluate the chapter's recent performance and build consensus around how we can better achieve them in the upcoming year.
- Introduce the assessment:



- ☛ Prior to the retreat, chapter leaders reviewed all the activities, initiatives, and events that members either led or participated in during the course of the past year. Because values are our measure of performance, these activities are categorized according to how they fulfill each value. After reviewing each of the activities, chapter leaders completed a brief assessment of the success of each one.
- ☛ They are going to present the results as our state of the chapter. Listen carefully to reflect on the year and identify common themes.
- ☐ Invite the leaders who are presenting to come to the front of the room.
- ☐ Invite them to present their results. Each officer should take no more than three (3) minutes.
- ☐ After the presentation, ask members the following discussion questions:
 - ? What themes did you hear repeatedly throughout all five (5) presentations?
 - ? Is there anything that surprised you?
 - ? Did they forget anything?

Performance Assessment (30 minutes)

- ☐ Split participants into five (5) randomly assigned groups.
- ☐ Assign one value to each group
- ☐ Distribute the following materials to each group:
 - The Chapter Performance Worksheet for their respective value.
 - One (1) copy of the Performance Evaluation questions.
 - One (1) piece of chart paper.
 - One (1) marker.
- ☐ Provide the following instructions:
 - ☛ As a group, your job is to evaluate the chapter's performance in this value area by reviewing this list of activities. There are two (2) steps in this process.
 - ☛ First, use the questions on the Evaluating Performance worksheet to analyze how well you are doing in fulfilling this value.
- ☐ Refer them to the discussion questions in their worksheet:
 - ? What highlights are worth celebrating in this value?
 - ? Where did you fail, fall short of your potential, or miss your goal in fulfilling this value?
 - ? Based on your analysis, use a letter grade to rate the chapter's overall achievement of this value in comparison to its potential, and explain why you rated it that way.
 - ? What are some of the contributors that led to your successes and failures?
 - ? What are your aspirations for better fulfilling this value during the coming year?



- ❑ After you have answered these questions, score your performance in your assigned area with a letter grade. You should write that letter grade on your chart paper, along with a short statement about why you rated it the way you did.
- ❑ Give groups about fifteen (15) minutes to work.
- ❑ After about fifteen (15) minutes, ask each group to present its results in up to three (3) minutes.
- ❑ Thank participants for their honest self-assessment, and make the following transition comments:
 - 🗨 This helps us understand what worked and what did not. After lunch, we will look deeper to determine what we can do to strengthen the chapter and boost our performance over the next year.
 - 🗨 But first, we have one more activity before lunch.

My Contribution (15 minutes)

- ❑ Ask participants to find one partner that they see, talk to, or interact with infrequently.
- ❑ Distribute the My Contribution / My Commitment worksheets. Each pair should have a copy.
- ❑ Provide instructions for the activity:
 - 🗨 As we think about chapter-level challenges and achievements for the past year, it is also appropriate to examine each of our individual contributions to the chapter's successes and shortcomings. If we want to improve the chapter, each one of us will also need to work towards improvement.
 - 🗨 Over the next fifteen minutes, you and your partner have four questions to answer for each other (these are listed on the My Contribution side of the worksheet):
 - How have your actions aligned with Psi Upsilon's values?
 - Where have your actions conflicted?
 - What have you done to support the organization in the past year?
 - How have you fallen short of Psi Upsilon's expectations in the past year?
 - 🗨 Please remember to be honest and open in this conversation. This is not meant as a fault-finding process, but as a self-improvement process. We will revisit this at the end of the day.
- ❑ Give participants about fifteen (15) minutes to work.
- ❑ After fifteen (15) minutes, transition to a break for lunch.



Capabilities Analysis

Timing

12:30 - 2:00 pm

Learning Outcomes

- Articulate a thorough, honest assessment of the chapter's current capabilities
- Explain the framework for chapter improvement
- Describe the role of capabilities in successful organizations
- List potential areas for improving the chapter using the capability model

Materials

- Five (5) pieces of chart paper
- Five (5) markers
- Five (5) copies of the Capabilities Analysis Worksheets

Setup Notes

- It may be helpful to write the formula and categories on chart paper in advance of this session.

Outline

Chapter Development Formula (15 minutes)

- ❑ Welcome participants back from the break.
- ❑ Write the chapter development formula on the top of chart paper, leaving empty space below.
 - Capabilities + Effort = Performance
- ❑ Introduce the formula:
 - 🗣 We just evaluated the chapter's performance and identified some of the things you want to improve. In order to improve, though, we need to look not at the outcome, but at the input. We need to answer the question, "what is it about how we operate that gets us better results?"
 - 🗣 Putting in more effort could certainly help, but that will only get us so far. There are a lot of things we want to achieve, but we have a limited amount of time and effort to invest. We should therefore spend some of our time on building capabilities.
 - 🗣 Capabilities are systems and structures within the organization that help us achieve more with less, and that allow us to act effectively and efficiently when needed.
- ❑ Consider sharing a sports analogy:
 - 🗣 The same is true for athletes. They invest in training to build up strength and coordination (capabilities) so their efforts during the competition can lead to



maximum performance (outcome). They cannot get the same results without building their capabilities.

- Write the following categories in the blank section of chart paper as you introduce each one: relationships, network, coordination/communication, learning, and culture.

- Internal Relationships: This includes our ability to get along and make the best use of one another's talents so we avoid wasting time and energy.
- Network: The connections, partnerships, and reputation we have with others outside the organization are capabilities. These things give us access and opportunity to accomplish more without having to do everything internally or on our own.
- Coordination & Communication: This includes how effective we are at keeping everyone informed and organized. If members are disorganized or confused, a lot of our effort becomes wasted, and we get frustrated in the process.
- Learning: As a capability, learning includes the knowledge and skills of our members, our ability to anticipate potential threats, opportunities, and changes, and how we incorporate feedback.
- Culture: Like any group, we have habits, common practices, and unwritten rules about how we operate. These are helpful in facilitating cohesion and continuity, but they can occasionally lead to dysfunction.

Capability Analysis (45 minutes)

- Provide instructions:
 - In order to figure out how we can make the most of our efforts to improve chapter performance, we are going to look at where we stand in terms of each of these capabilities.
 - In a moment, we will break into groups. Each group will evaluate the chapter's performance over the last year based on what you just heard about the state of the chapter by answering critical questions about one of these capability areas. You will have about fifteen (15) minutes to work, and I will ask you to share your analysis at the end.
 - This will be a two-part process. For now, focus only on the past – where we have been over the past year up to this point today. We will look to the future at a later time.
- Organize participants into new randomly-selected new groups, and assign one of the capability areas to each group.
- Distribute one Capabilities Analysis worksheets to each group. They will be answering the following questions.
 - ? How did this capability affect our performance over the past year?
 - ? What things do we do well in this area that help us get results?
 - ? What things do we do poorly in this area that are getting in the way of results?



- ❑ Give groups about fifteen (15) minutes to work.
- ❑ After about fifteen (15) minutes have passed, ask each group to provide a 1-minute report of their analysis.
- ❑ Debrief the activity with the following questions:
 - ? What is your reaction? How do you think you are doing?
 - ? Did you notice any patterns or trends?
- ❑ Take a few responses to each question, then continue.

Defining Success (30 minutes)

- ❑ Participants should remain in the same groups.
- ❑ Distribute one piece of chart paper to each group.
- ❑ Ask groups to draw a horizontal line across the center of the page, label the top “high performing organizations,” and the bottom “potential improvements.”
- ❑ Introduce the next activity:
 - 🗨 To continue with part two of this process, we will continue exploring these capability areas, but this time with a look to the future. We need to define what “better” might like.
 - 🗨 This time you have two sets of questions, which are listed on the next page of your worksheet. First, forget the fraternity and think about high-performing organizations in general, and make notes about how you think they handle your capability area. What activities make things work for them? How do they operate? What systems do they have in place?
 - ? Describe what a healthy, high performing organization looks like in this area. What activities make things work for them? How do they operate? What systems do they have in place?
 - 🗨 Write your answers on the top of the page, and take about half of your time on this. I will share a reminder when you should move to the next set of questions.
 - 🗨 Second, spend the rest of your time on the bottom of the page, make notes about how you think your chapter might improve. There are three questions that should guide you:
 - ? How do we do more of what we are doing well?
 - ? How might we overcome / eliminate some of the barriers that are holding us back?
 - ? Describe what will happen when these changes are implemented: What results would they get us?
 - 🗨 Write your ideas on the bottom of the page.
- ❑ Remind participants to write clearly and legibly, as other people will be reading the results.
- ❑ Give groups about ten (10) minutes to work.
- ❑ After ten (10) minutes, remind them to move on to the second set of questions.
- ❑ Give groups about ten (10) minutes to work.



- ❑ After the second ten (10) minutes, bring the group back together.
- ❑ Transition to a fifteen (15) minute break.



Prioritization and Action Planning

Timing

2:15 - 3:30 pm

Learning Outcomes

- List top priority areas for improvement
- Demonstrate excitement about potential action steps to improve the chapter
- Describe personal contributions they plan to make to improve the chapter

Materials

- Three (3) to six (6) colored stickers per participant (such as Avery® Round Color Coding Labels - #5050)
- One (1) piece of chart paper
- One (1) marker
- Three (3) index cards per participant
- Writing utensils for each participant
- My Contribution / My Commitment Worksheets used earlier

Setup Notes

- It may help to cut strips of three (3) or six (6) colored stickers in advance of the program or during the break. Use more stickers number for a smaller audience, or vice versa.

Outline

Prioritizing Improvements (20 minutes)

- ❑ Distribute three (3) to six (6) colored stickers to each member.
- ❑ Welcome participants back to the final segment of the retreat and review the progress:
 - 🗣 We have looked back over the past year, evaluated our performance, analyzed our capabilities, and defined what “better” might look like for us. Now it is time to focus our energy on what we intend to do about this.
 - 🗣 It’s impossible and unwise to address everything at once, so we need to narrow these possibilities to a few important priorities for the coming year.
 - 🗣 To do that, we are going to use a democratic process. Over the next five (5) minutes, wander around the room and read the other groups’ notes about what successful organizations look like and how we might improve the chapter. The stickers in your hand are the real-life version of the “likes” on Facebook®. Place a sticker next to each idea that you believe should be the top priority for improving the chapter this year.
- ❑ Invite participants to wander and “like” their favorite ideas.
- ❑ After about five (5) minutes, bring the group back together to review the results.



- ❑ A small number of ideas should emerge as most important based on a high number of “likes.”
- ❑ Walk to each poster and read aloud the concepts that members identified as most important. After reading each one, ask participants:
 - ? What made you choose this?
 - ? Explain how this would improve our performance?
- ❑ Look for about two (2) responses to each question, then continue until you have addressed the top three (3) priorities.
- ❑ It may be helpful to list the top ideas on a new piece of chart paper.
- ❑ After reviewing the results, ask the following discussion questions:
 - ? Are there any areas that you think should have been higher?
 - ? Are there any that you think we should not spend time on?
- ❑ After about ten (10) minutes of discussion, continue with the next activity.

Chapter Recommendations (15 minutes)

- ❑ Distribute three (3) index cards to each participant
 - 🗨 At this point, our priorities are clear, but we need to develop specific action items for how we intend to bring them to life.
- ❑ It may be helpful to revisit the athlete analogy:
 - 🗨 We now know our priorities for improving strength and conditioning, and now it is time to develop our training plan.
 - 🗨 During this next activity, you will work with two partners. In your triad, think about each of these top priorities and how we might enact them. Focus on the specific steps you, as a chapter, might take to address barriers or build upon strengths. Write down each of your suggested action items on an index card, and label it with the priority it addresses.
- ❑ Participants should work in groups of three (3), preferably with members they have not yet interacted with during the retreat.
- ❑ Give participants about ten (10) minutes to work.
- ❑ After ten (10) minutes, collect the index cards.
- ❑ Review progress and share next steps:
 - 🗨 We now have clear priorities for the coming year including multiple ideas for strengthening our capabilities and direction about where to focus our efforts.
 - 🗨 When we conclude the retreat this afternoon, chapter leaders will compile your suggested action items and organize them into the chapter’s final plan.
 - 🗨 There are also many things we can learn that would address some of the priorities. The results will be shared with headquarters, select alumni, and others who can provide assistance and information to help. These people will work with



you to provide additional resources, training, and assistance in implementing your plan this year.

My Commitment (30 minutes)

- ❑ Transition into the final activity.
 - 🗨 Earlier today you worked with a partner to evaluate your personal contribution to the chapter's performance over the past year. To conclude our time together, we need to revisit that conversation while thinking about the future. Achieving these results for the chapter will take personal commitment from each one of us.
- ❑ Ask participants to pair up with their original partner to talk about their personal commitments.
- ❑ Each pair should have a copy of the My Contribution/My Commitment worksheet, and should focus on the commitment questions:
 - ? What might you do to more consistently and fully enact Psi Upsilon's values in the coming year?
 - ? What could you do to help the chapter carry out each of its values in the coming year?
 - ? What will you commit to doing to better yourself and the organization?
- ❑ Give participants about ten (10) minutes to work,
- ❑ After about ten (10) minutes, invite each participant to stand and share one personal commitment with other members.

Closing Commitments (10 minutes)

- ❑ Thank members for their participation in the retreat and their commitment to improving the chapter.
- ❑ Remind participants about next steps.
- ❑ Close the session, dismiss participants, and move into the officer planning session.



Officer Planning Session

Timing

3:45 - 5:00 pm

Learning Outcomes

- List priorities and strategies for improvement from memory
- Identify specific action items to be completed with deadlines, responsibilities, and other details
- Feel a sense of confidence that they will follow through

Materials

- Three (3) copies of the Planning Worksheet
- "Defining Success" completed chart pages
- Index cards with recommended action items
- Laptops and access to online retreat forms

Setup Notes

- Nearby boardroom or work space for a small group with a large table
- Bring materials from the retreat room, specifically the retreat worksheets
- If possible, have members complete this through the online forms.

Outline

Welcome (10 minutes)

- ❑ Welcome officers to the session.
- ❑ Review the ideas behind the retreat:
 - 🗨 Remember, our plan today was to have members complete an assessment of the chapter, determine what capabilities would make us better, and develop a plan for chapter improvement.
 - 🗨 Keep in mind, this is not about giving more effort to one area or leading a single new event or initiative. It is about improving our capabilities: the systems and structures within the organization that help us achieve more with less, and that allow us to act effectively and efficiently when needed.
- ❑ Review the outline:
 - 🗨 Our goal is to translate the outcomes of the retreat into specific action plans for the chapter and for your individual leadership position.
 - 🗨 First, we will sort and prioritize the recommendations your members gave.
 - 🗨 Then we will select and define officer- and chapter-level responsibilities.
 - 🗨 And finally, we will document everything.
- ❑ Distribute the three (3) Planning Worksheets, one for each priority.



- ❑ One leader should fill in notes about each priority as the group works.
- ❑ Ask participants to fill in the information they already have, including:
 - Chapter information
 - Assessment results
 - Top priorities

Defining Success (10 minutes)

- ❑ Use the following questions to guide leaders in writing a definition of success for each priority.
 - ? Look back at the chart pages participants completed earlier. What did they say that is relevant here?
 - ? How will you know you have accomplished this?
 - ? What specific indicators would tell you that you are successful?
- ❑ Address each of the three priorities, one-at-a-time, and ask the officer documenting that priority to write the definition into the worksheet.
- ❑ Spend up to three minutes discussing each priority.
- ❑ After success is defined, continue to action planning.

Affinity Sort (15 minutes)

- ☞ To decide how to fulfill these priorities, we first look to your members' recommendations.
- ❑ Distribute index cards containing recommended action items to officers.
 - ☞ In order to make sense of these recommendations quickly, we are going to do an affinity sort. What this means is we will individually review each card and work together to group similar ideas together.
 - ☞ Take a few moments to read through each card.
 - ☞ If you see duplicates, attach them together.
 - ☞ As you see common themes emerge, organize them into groups.
 - ☞ In the end, we should see a few ideas emerge as most frequent and important.
- ❑ This is an organic process. Participants could organize these in a number of ways. Allow them to organize in whatever way they find most useful.
- ❑ When they are done, use the following questions to examine the results:
 - ? What are the main recommendations?
 - ? Are there any outlier ideas that we should consider?
 - ? What things do you like most?
 - ? What recommendations might be problematic?
 - ? Is there anything you want to eliminate or veto?



- ❑ If officers collectively think any action items should be vetoed because it violates laws, policies, or Psi Upsilon values, remove them from the table.

Action Planning (25 minutes)

- ❑ Guide participants in selecting one or two initiatives from the affinity sort that fulfill each priority. The chapter should have no more than five (5) total initiatives.
- ❑ Ask participants to record these initiatives on the respective priority worksheet. Although initiatives may address multiple priorities, they should only be documented with the priority it serves most.
- ❑ Provide instructions for defining specific action items:
 - 🗨 In processes like these, initiatives tend to only get implemented when we have a clear picture of exactly what happens next. To bring each of these initiatives to life, we have three details to add:
 - 🗨 For each initiative, list the next three immediate action steps to get started. This could be an internet search, a meeting, a phone call, completing paperwork, etc. Think of specific individual first steps you need to take.
 - 🗨 For each initiative, list the major important steps along the way between now and when it is complete. Whether you call these benchmarks, milestones, or small-wins, they should help you think through each stage of the project.
 - 🗨 And finally, for each action step, write down the name of a specific person who should be responsible for carrying this out.
- ❑ Depending on the number of leaders participating, they should either work individually or in pairs.
- ❑ Give participants about ten (10) minutes to work.
- ❑ When ten (10) minutes are complete, bring participants back together.
- ❑ Ask each officer to review their results, and invite others to add missing information.
- ❑ When the group has reviewed the action plan, move on to discuss next steps.

Results and Next Steps (15 minutes)

- ❑ Ask officers the following discussion questions:
 - ? How can your leadership role support the implementation of these initiatives?
 - ? What else do you need in order to be successful in carrying these out?
- ❑ Review the supplemental workshop topics and determine if any are appropriate to the chapter and if the chapter is interested in them. If so, make arrangements to schedule this as a follow up session.
- ❑ Share the next steps regarding communication and action planning:
 - 🗨 These plans will be shared with other supporters who can help provide additional training, resources, and support.
 - 🗨 We will check in next week, at the end of the month, and at the end of the semester to track your progress and find out what else you need.



- ❑ Set a meeting with officers prior to the next chapter meeting to review progress and next steps.
- ❑ Determine whether additional follow-up workshops are needed, and make plans with officers for delivering them.
- ❑ Thank leaders, collect materials, and close the session.



CHAPTER PERFORMANCE WORKSHEET

Chapter leaders should complete this page of the worksheet and submit it to the facilitator at least one week prior to the retreat.

Lifelong Friendship

Psi Upsilon unites its members in a diverse brotherhood of firm and enduring friendship that will last a lifetime.

Activities, Initiatives, and Events	Rating	Notes
	☆☆☆☆	
	☆☆☆☆	
	☆☆☆☆	
	☆☆☆☆	
	☆☆☆☆	
	☆☆☆☆	
	☆☆☆☆	
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	☆☆☆☆	
	☆☆☆☆	
	☆☆☆☆	
	☆☆☆☆	
	☆☆☆☆	

Summary:



EVALUATING PERFORMANCE

Using the Chapter Performance Worksheet that officers completed before the retreat, evaluate the chapter's performance of this value over the past year. Use the questions below to guide your group's work.

- ? What highlights are worth celebrating in this value?
- ? Where did you fail, fall short of your potential, or miss your goal in fulfilling this value?
- ? Based on your analysis, use a letter grade to rate the chapter's overall achievement of this value in comparison to its potential, and explain why you rated it that way.
- ? What are some of the contributors that led to your successes and failures?
- ? What are your aspirations for better fulfilling this value during the coming year?



MY CONTRIBUTION

Ask your partner the following questions, and then share your answers with him. Both of you should answer one question before moving to the next one, but you may want to alternate who answers first.

- How have your actions aligned with Psi Upsilon's values?
- Where have your actions conflicted?
- What have you done to support the organization in the past year?
- How have you fallen short of Psi Upsilon's expectations in the past year?



MY COMMITMENT

Ask your partner the following questions, and then share your answers with him. Both of you should answer one question before moving to the next one, but you may want to alternate who answers first.

- ? What might you do to more consistently and fully enact Psi Upsilon's values in the coming year?
- ? What could you do to help the chapter carry out each of its values in the coming year?
- ? What will you commit to doing to better yourself and the organization?



CHAPTER DEVELOPMENT WORKSHEET

Capabilities + effort = performance

Capabilities are systems and structures within the organization that help us achieve more with less, and that allow us to act effectively and efficiently when needed.

Part 1: The Past Year

- “Answer the following questions as a group using the State of the Chapter report you just heard from officers, focusing specifically on your assigned capability area.”
- ? How did this capability affect our performance over the past year?
- ? What things do we do well in this area that help us get results?
- ? What things do we do poorly in this area that are getting in the way of results?

Part 2: Defining Success

Top

- ? Describe what a healthy, high performing organization looks like in this area. What activities make things work for them? How do they operate? What systems do they have in place?

Bottom

- ? How do we do more of what we are doing well?
- ? How might we overcome / eliminate some of the barriers that are holding us back?
- ? Describe what will happen when these changes are implemented: What results would they get us?



PLANNING WORKSHEET

Fields include:

- Chapter
- Term / Year
- Capability: List the top three (3) priority focus areas
- Define success
- Initiative #1
 - Action items list with assignments
 - List of benchmarks
- Initiative #2
 - Action items list with assignments
 - List of benchmarks
- Plan for continued training:
- Meeting times:
 - Next week
 - Next month
 - End of semester
- Follow up plan
-



CHAPTER PERFORMANCE DASHBOARD

Chapter	Retreat Date	Priorities	Initiatives	Follow up Notes and Next Steps	On track?	Improving?
<i>SAMPLE: Omega Omega</i>	9/15/15	1. Improve our network on campus 2. Improve communication and organization 3. Hold one another to a high standard	1a. Increase involvement in other organization. 2a. Create a central storage space for minutes. 2b. Create a shared calendar. 3a. Create a standards board system. 3b. Increase points system requirements	Week 1 check in on 9/22 - COMPLETE Call on 10/15/15 Standards program on 11/1/15	+	+



SUPPLEMENTAL WORKSHOP CURRICULUM

Description

This interactive workshop guides chapter leaders in addressing specific issues affecting their capabilities in order to help them continually improve their performance. Although there is a small educational component, the session primarily focuses on group development rather than traditional training.

Timing

60 minutes

Learning Outcomes

- Articulate a more detailed understanding of the issue and its effects on the chapter
- Identify specific changes that individuals and the chapter can make to overcome this issue
- Increase the chapter's ability and likelihood of following through on the initiatives identified during the retreat.

Materials

- None.

Setup Notes

- Review results of the retreat to be familiar with the chapter's priorities and plans.
- Work with the chapter to select a specific focus for the workshop, and review the materials provided regarding this issue.

Outline

Introduction (5 minutes)

- ❑ Welcome participants.
- ❑ Revisit the retreat and its outcomes.
- ❑ Ask a chapter leader to summarize progress, successes, and failures since the retreat.
- ❑ Discuss the topic and purpose of this follow up workshop:
 - 🗨 We decided that it was important to spend extra time on this topic because...
- ❑ Share expectations for this session:
 - 🗨 This session will resemble a learning and problem-solving workshop that focuses on a single topic. Everyone should be involved in discussing, diagnosing, learning about, and developing potential solutions for the issue.
 - 🗨 Our ability to succeed is directly related to our willingness to have an open, honest conversation about our chapter and how we operate.
 - 🗨 Your role is to work together to chart the course of the chapter. My role is that of facilitator, meaning that I am here to:
 - Help the discussion run smoothly and remain on track.



- Point out problems and issues that you may need to address.
 - Challenge you to address issues you may want to avoid.
 - Help you make decisions, rather than making decisions for you.
- ❑ Share any additional expectations that you believe are relevant.
 - ❑ Ask participants to share any additional expectations they have for the event.

Group Discussions (10 minutes)

- ❑ Lead the group through an examination of the issue using the following questions:
 - ? What do you want this area to look like? What are your goals in this area?
 - ? How is this issue getting in the way of your success?
- ❑ After about ten (10) minutes of discussion, continue to the next section.

Topic-Specific Content (10 minutes)

- ❑ Review the concept provided in supplemental materials related to the issue you are addressing during this session.

Planning (20 minutes)

- ❑ Lead the group through an examination of potential ideas using the following questions:
 - ? What things are we already doing well in this area?
 - ? Where have we addressed problems like this before?
 - ? What might we try to do differently?
 - ? What are we willing to try?
- ❑ After about fifteen (15) minutes of discussion, guide participants in identifying two outcomes:
 - One step each individual can take to help address the issue.
 - One step chapter leadership can take to address the issue.
- ❑ Provide additional commentary to encourage participants to continue working through the issue.

Closing (5 minutes)

- ❑ Thank members for their participation in the follow up session and for their continued commitment to improving the chapter.
- ❑ Close the session and dismiss participants.



FOLLOW UP WORKSHOP CONTENT

The following topics can be addressed through a five (5) to fifteen (15) minute lesson involving the content provided below. It is recommended that you focus on only one topic per workshop.

Topic	Content
Internal Relationships	
Overcoming cliques	Students learn about how cliques emerge. Through short activities, they examine cliques in their organization, explore the balance of similarities and differences among members, and identify strategies for strengthening bonds throughout the chapter.
Working through philosophical differences	Participants identify sources of conflict in the organization, list potential philosophical differences, and use a scale to visualize where they stand. Through practice with perspective taking and learn how to apply various techniques and objectives for managing conflict.
Brotherhood building: Deep versus shallow connections	Participants complete a personal sharing activity and discuss the differences between shallow and deep connections.
Network	
Finding resources and building partnerships	Participants create a map of their connection to various department and stakeholder groups on campus and explore their needs, resources, and goals.
Increasing affinity among stakeholders	Participants learn about what influences affinity, identify opportunities to celebrate others, and evaluate their relationship with each stakeholder.
Balancing brotherhood and friendship	Participants conduct a modified cost-benefit analysis in order to differentiate friendship and brotherhood.
Communication and Coordination	
Mapping and streamlining information flow	Participants create a diagram of information flow through the organization in order to determine gaps and breakdowns.
Becoming an organized organization	Facilitator introduces common practices in information sharing for an organization, and participants work in small groups to develop proposed initiatives to help the chapter become better organized.
Wasted effort, time, money	Participants create a series of pie charts to illustrate how they are investing energy in a variety of areas and how it compares to their intentions and priorities.
Culture	
Getting awards and incentives right	The facilitator introduces the influences of motivation and its role in facilitating culture, and members evaluate cues reinforcing their current situation.
Eliminating assumptions and misperceptions	Participants anonymously share their true perceptions with other members by answering four questions posted around the room related to the issues involved.
Adjusting environmental influences	Participants define issues related to their culture, learn about the influence of environment, and diagnose opportunities to shape new behaviors.



Learning	
Error detection and course correction	Participants evaluate a previous situation that went poorly by creating short scenarios that led up to it. They then identify and develop solutions for acting on early errors and warning signs.
Getting unstuck from the status quo	Participants identify situations where they are stuck in a status quo problem, and use the five whys exercise to examine it through the lens of big picture goals and purpose.
Chapter-wide skill building	Participants complete a self-assessment of their skills, identify gaps, and determine how to build additional talent into the chapter, and make the best use of all members' abilities.