

Executive board retreat strategy guide

A plan of action by the 20xx Executive Board for the [Chapter Designation] Chapter of the Alpha Epsilon Pi Fraternity at [University]



March 20, 2020

[Chapter Designation Chapter]

[University]

**Executive Board**

**Master**: [Name]

**Lt. Master**: [Name]

**Scribe**: [Name]

**Exchequer**: [Name]

**Sentinel:** [Name]

**Brother-at-Large**: [Name]

**Rush Chair**: [Name]

**New Member Educator**: [Name]

***E-Board 10 Commandments***

1. No excuses.

2. Be accountable.

3. Always keep best interests of AEPi in mind.

4. Be transparent.

5. Listen to others.

6. Be unified.

7. Be professional.

8. Be punctual.

9. Lead by example.

10. Give it 100%.

***What We Value***

1. Quality AND quantity rush results
2. Proactive Health and Safety
3. Healthy, concise new member education: No hazing, quick process, on-time dues
4. Conclave and convention attendance
5. Jewish programming
6. \*Philanthropy: $x
7. \*Leadership in the community: Civic engagement and community service
8. On-time dues payments

**Looking Back**

*We must look at the past to plan for the future. In this section, the E-board will look at the positives and negatives that have affected the chapter over the past year.*

**Chapter Analysis**

**PAST E-BOARD STRENGTHS AND SUCCESSES**

**PAST E-BOARD FAULTS AND FAILURES**

**WHAT HAS HAPPENED THAT AFFECTED THE FRATERNITY POSITIVELY?**

**WHAT HAS HAPPENED THAT AFFECTED THE FRATERNITY NEGATIVELY?**

**WHAT DID WE ACCOMPLISH IN OUR TIME SHORT TIME AS E-BOARD?**

**Assets and Liabilities**

**ASSETS**

*What does this fraternity have that makes us awesome? What makes us better than the rest? What do we have that can be utilized? Why would someone want to rush AEPi?*

**LIABILITIES**

*What are some things that hold us back? What are some of our deficiencies? What are reasons we are not number one? Why would someone* ***not*** *want to rush AEPi?*

**Opportunities and Threats**

**Opportunities**

Where are some places or what are some aspects that we have an opportunity to grow in the next semester/year?

**Threats**

What are the areas of concern moving forward that may cause the chapter extra stress in the next semester/year?

**GOAL SETTING**

*Success cannot be achieved until there is a metric by which to measure your success. In this section, E-board will form long and short-term goals.*

**5-Year Goals**

*By visualizing a future that seems far-fetched, we can take steps within our 1-year term to make them more realistic. Five years from now, after everyone has graduated, our vision should be complete.*

**WHAT DO WE WANT THE FRATERNITY TO LOOK LIKE IN 5 YEARS?**

*What stats do we want to see as consistent? What events do we the fraternity to be capable of? What assets should the chapter have 5 years from now?*

**WHAT ARE SOME BASIC STEPS WE CAN TAKE TO MAKE THAT HAPPEN?**

*While we won't be around, what basic steps can we take to make sure our plan is inherited and adapted over time and will still accomplish these goals?*

**1-Year Goals**

*With the 5-year vision in hand, brainstorm what goals should be set for this year that will make the 5-year plan possible.*

**WHAT CAN WE ACCOMPLISH OVER THIS YEAR THAT IS CONDUCIVE TO THE 5 YEAR GOALS?**

*What are the first steps needed? How can we get brothers on board? How can we empower the future?*

**WHAT DO WE WANT TO ACCOMPLISH OVER THIS ONE YEAR TERM?**

*What stats do we want to see as consistent? What events do we the fraternity to be capable of? What goals do we want to achieve?*

**Semester Goals**

*Now that you have goals for the next year, focus down on what goals you will hit THIS SEMSTER to make the 1-year goals successful.*

**WHAT CAN WE ACCOMPLISH DURING THIS SEMESTER THAT IS CONDUCIVE TO OUR ONE YEAR PLAN?**

*What are the first steps needed? How can we get brothers on board? How can we empower the future?*

**WHAT DO WE WANT TO ACCOMPLISH OVER THIS SEMESTER?**

*What stats do we want to see as consistent? What events do we the fraternity to be capable of? What goals do we want to achieve? What liabilities can we turn into assets?*

**E-BOARD ALIGHNMENT**

*For E-board to work as a cohesive team, you all must be on the same page about everything. In this section you will align your perspectives of each other, take the goals you set above, and create a Mission Statement.*

**Member Strengths and Weaknesses**

*The strengths and weaknesses of each E-Board Member, as assessed by the rest of E-Board.*

***MASTER***

Strengths:

Weaknesses:

***LT. MASTER***

Strengths:

Weaknesses:

***EXCHEQUER***

Strengths:

Weaknesses:

***SCRIBE***

Strengths:

Weaknesses:

***BROTHER-AT-LARGE***

Strengths:

Weaknesses:

***E-Board Mission Statement***

EXAMPLE: To create an open, tightknit brotherhood, that lives up to our claim as the best fraternity on campus and promotes positive vibes and relationships, through engagement with other organizations and large-scale philanthropy events.

**EXECUTIVE BOARD REPORTS**

**Master Report**

* Goals for this E-Board
* Things learned from the Master’s one-pager that have significance to everyone
* New Ideas
* E-Board Approval

**LT. MASTER REPORT**

* Goals for this E-Board
* Chairs and Committees
	+ Jewish Identity
		- Chair Nominees:
		- Chair Selected:
		- Committee Members:
		- Goals:
		- To-Dos:
	+ Philanthropy:
		- Chair Nominees:
		- Chair Selected:
		- Committee Members:
		- Goals:
		- To-Dos:
	+ Brotherhood:
		- Chair Nominees:
		- Chair Selected:
		- Committee Members:
		- Goals:
		- To-Dos:
	+ Social Media:
		- Chair Nominees:
		- Chair Selected:
		- Committee Members:
		- Goals:
		- To-Dos:
	+ Rush:
		- Chair Nominees:
		- Chair Selected:
		- Committee Members:
		- Goals:
		- To-Dos:
	+ New Member:
		- Pledge Master:
		- Committee Members:
		- Goals:
		- To-Dos:
	+ Social:
		- Chair Nominees:
		- Chair Selected:
		- Committee Members:
		- Goals:
		- To-Dos:
* New Ideas
* E-Board Approval

**SCRIBE REPORT**

* Goals for this E-Board
* New Ideas
* E-Board Approval

**EXCHEQUER REPORT**

* Goals for this E-Board
* Budget and Grants
* New Ideas
* E-Board Approval

**SENTINEL REPORT**

* Goals for this E-Board
* Health and Safety Policies
* New Ideas
* E-Board Approval

**BROTHER-AT-LARGE REPORT**

* Goals for this E-Board
* Committee
* Events and Plans
* New Ideas
* E-Board Approval

**RUSH REVIEW**

* Past Successes
* Past Failures
* Goals
* Concerns
* Plan to Alleviate Concerns
* Sponsorships

**NEW MEMBER REVIEW**

* Past Successes
* Past Failures
* Goals
* Concerns
* Plan to Alleviate Concerns

**HEALTH & SAFETY**

**REVIEW AEPi HEALTH AND SAFETY POLICY**

**WHAT HAS BEEN DONE THIS PAST SEMESTER TO MINIMIZE RISK?**

**WHO ARE SOME SPEAKERS/PROFESSIONALS THAT WE CAN BRING IN TO TEACH ON H&S TOPICS?**

**CONSTITUTION AND BY-LAWS**

**ISSUES CONCERNING CONSTITUTION AND BY-LAWS**

**WHAT SITUATIONS OCCURRED THIS YEAR THAT NEED TO BE AMENDED INTO THE BY-LAWS?**

**CONSTITUTIONAL COMMITTEE**

* Members
* Goals
* Plan of Action