



# DELTA KAPPA EPSILON

Gentlemen, Scholars & Jolly Good Fellows

## **Executive Board Retreat Agenda (Virtual)**

Virtual or in-person, a retreat should consist of four key components. Learning, Sharing, Bonding, and Unifying. Below is a template agenda for organizations to utilize to create a meaningful Executive Board Retreat as well as tips for success in this virtual environment.

### **Technology Platforms:**

- Google Hangout
  - Google offers Hangouts where up to 10 attendees can meet via video. With a Gmail account, you can meet on-demand, or schedule through your Google calendar by “adding conferencing.”
- Microsoft Teams
  - Teams allows participants to call into meetings, share screens, and collaborate on resources. Many universities provide this service to students for free
- Skype
  - Skype offers free video and call conferences for up to 50 attendees. This tool also offers screen and audio recording for any information that needs to be shared with a member who can not attend.
- Zoom Video Communications
  - Zoom offers free video conferencing for up to 100 attendees. With the free version, calls are limited to 40 minutes.

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### **Agenda Items:**

- Learning:
  - Financial Review
    - Ensure all members understand the financial standing of the organization. What do dues go to, how is the budget structured, and what expenses do you have coming up.
  - Personality Assessments
    - Encourage members to take an online personality assessment and review the results as an executive team. This will allow your team to better understand your member’s needs, work styles, and how you can best program for them.

- Chapter Operations:
  - Provide a space for members to discuss what chapter operations questions they may have. Allow each officer/member to provide an update to what their position responsibilities are and what they aim to accomplish.
- Sharing:
  - Positive Acknowledgement:
    - Provide members a place to congratulate or thank others for their contributions, highlight specific actions members of the committee have taken to improve the organization, and praise members who live the DKE Values/Objects.
  - Desires & Ideas for Improvement:
    - Create a time for members to bring ideas for improvement to retreat. Create a list of desired improvements, changes, and areas of need for the organization.
- Bonding:
  - Learning a New Skill:
    - Take some time for the Executive Committee to all learn how to utilize the campus event reservation system, how to request funding from the university, or how to utilize a new communication system within the organization.
  - Games:
    - Create a space for team members to connect through virtual games such as FaceTime, Video Game tournaments, or online versions of card games.
- Unifying:
  - Creating a Strategic Plan:
    - Work through the goals set
  - Delegate a Targeted Contact List:
    - Create a targeted member communication plan by having each member of the executive committee assigned to 4-5 brothers. Each EC member will be responsible for calling, texting, and communicating any updates, check-ins, and feedback to their 4-5 members.

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### **Mock Agenda:**

- 9:00 am - 10:00 am - Executive Committee Meeting
  - Establishing EC Mission/Vision/Values
  - Creating a plan for Covid-19 Response/Needs
  - Goal Setting
- 10:00 am - 11:00 am - Committee Meetings
  - Brotherhood Committee
  - Scholarship Committee
  - Member Education Committee

- Etc.
- 11:00 am - 12:00 am - All Chapter Meeting
  - Opening: *Call the Meeting to Order*
  - Ice Breaker
  - Personal/Professional Check-in
    - Each attendee takes a moment to reflect on what is going well for them this week, what is not going well, and what they are working to improve on.
  - **Officer Reports:**
    - President (Brother Beta)
      - ...
    - Executive Vice President (Brother Sigma)
      - ...
    - Vice President of Membership (Brother Pi)
      - ...
    - Vice President of Health & Safety (Brother Mu)
      - ...
    - Vice President of Administration (Brother Nu)
      - ...
    - Vice President of Finances (Brother Kappa)
      - ...
    - Other Officers
      - ...
  - **Old Business:**
    - Items from previous meetings.
  - **New Business:**
    - Bylaw Revisions
    - Budget Approval
    - Etc.
  - **Goal Setting:**
    - Create several SMART Goals
      - Short Term Goals
      - Long Term Goals
      - Ongoing Goals
  - **Action Planning:**
    - For each goal, assign a lead and a support member.
  - **Check Out:**
    - Each attendee goes around and states what they will be doing over the next few months and listing their deliverables for the end of the summer.
  - **Meeting Closing**