

PI SIGMA EPSILON

PRESENTS

**WINTER
OFFICER
RETREAT**

WORKBOOK



PRE-RETREAT QUESTIONS

This year, the PSE Winter Officer Retreat is structured to kick-off your year with intention. We will be planning the year ahead and exploring how you can effectively lead your chapter. Before the event, please fill out this worksheet so you have a starting point for our event.

Chapter situational analysis

Address COG completion/goals, university or COB support, Awards Program history, and overall attitude of the chapter's membership.

a) Brief review of past 3 years:

b) Analysis of previous COG year performance:

c) Current branding/position on campus:

d) What does your chapter hope to accomplish this year?

Bonus: What do you hope to accomplish this year?

See you on January 16, 2021! Have this sheet ready!

NOTES

SWOT ANALYSIS

GOAL SETTING

Visualize

One year from now, what you you like you chapter to look like?

How many members are in your chapter?

What is the makeup of your chapter?

What kind of events and projects are you executing?

How many people are going to Regionals? Nationals?

What skills and personality traits make up the next Executive Board?

What is your relationship with your: Advisor? Alumni? HQ?

How much more money is in your chapter's bank account?

What was your member's favorite part of the year?

What are you mentioning in job interviews?

Anything else that comes to mind when visualizing your perfect chapter?

Use this page to help plan your one big goal for the next year. Be sure that it answers every aspect of a SMART goal.

Notes:

Specific Answer who/what/where/how/when.

WHAT exactly are you going to accomplish?

Action steps needed to reach this goal?

Measurable Add details, measurements and tracking details. Goals must include numbers.

I will measure/track my progress by using the following methods:

I will know I've reached my goal when:

Attainable What additional resources do you need for success?

Items I need, things I need to learn and people I will need support from:

Relevant List your reasoning.

Why do you want this goal?

Timely Put a deadline on your goal and set some benchmarks.

I will reach my goal by ___/___/_____.

My halfway measurement will be _____ on ___/___/_____.

Additional dates and milestones I'll aim for:

.....

Specific **M**easurable **A**ttainable **R**elevant **T**imely

Examples:

I will use classroom presentations, organization fairs, and my network to recruit 20 new dues-paying members by February 5th, raising our chapter membership total to 80. This will give us the ability to execute larger projects and improve our brand awareness on campus.

I will bring in at least one professional development speaker every month this year to create a beneficial relationship with their company and heighten the skills of our members. I will connect with our Faculty Advisor at the beginning of the semester to collect recommendations and contact information.

Use the worksheet on the previous page to create your goal. Write it here:

My goal for this year is...

What will this goal allow you to accomplish personally?

What trade-offs might you have to make if this becomes your main priority over the next year?

3-Month Target

What key milestones do you need to complete in the next 3 months to achieve your goal?

Which milestone will best help you complete the others?

In the next 3 months, what is the single BIGGEST THING you need to accomplish to stay on track?

Discussion

During your Executive Board planning meeting, have everyone share their Quarterly Action Plan. Every member of the team should know each other's goals and make the effort to support them as teammates.

Plan to provide feedback on each other's presentations. The goal should be to help each officer strengthen each plan, and provide helpful suggestions regarding challenges and new skills to be learned.

Three benchmarks for the next 3 months *What will you accomplish or create this quarter?*

Action Step 1

Action Step 2

Action Step 3

Tasks:	Progress
<input type="radio"/> _____	<input type="checkbox"/>
<input type="radio"/> _____	<input type="checkbox"/>
<input type="radio"/> _____	<input type="checkbox"/>
<input type="radio"/> _____	<input type="checkbox"/>
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Tasks:	Progress
<input type="radio"/> _____	<input type="checkbox"/>
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Tasks:	Progress
<input type="radio"/> _____	<input type="checkbox"/>
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What can you control?

What is outside of your control?

How can you put more of your results in your control?

What do you need to learn?

What obstacles or setbacks do you anticipate or have happened in the past?

What alternate routes could you take to avoid the setbacks?

What resources will you need?

NOTES

TENTATIVE DATES TO KNOW

All deadlines will be at 11:59pm CST on the dates below. In the event a date changes, you will be notified. The pse.org website is the best place for most up-to-date information.

Pro-Am Sell-a-Thon	Scenario Released	1/22/2020
	Modules and Video	3/26/2021
	Preliminary Round	4/8/2021
	Finalists Announced	4/8/2021
	Final Round	4/9/2021
	Winners Announced	4/11/2021
Awards	Call for Entries Released	Done
	Intent to Compete Due	1/8/2021
	Written Entries Due	2/5/2021
	Finalists Announced	2/26/2021
	Final Round	4/8/2021
	Winners Announced	4/11/2021
Speakers	Scenario Released	2/26/2021
	Preliminary Round Due	3/12/2021
	Finalists Announced	3/19/2021
	Final Round	3/26/2021
	Winners Announced	4/11/2021
Scholarship	Application Open	01/10/2020
	Applications Due	02/19/2021
	Finalists Announced	3/12/2021
	Final Interviews	4/1-4/2/2021
	Winners Announced	4/11/2021