

Schedule Outline For A Officer Transition Retreat

Preparation work: A questionnaire is to be completed by both the new and old officers before arriving at the retreat. The outgoing officer must complete the “End of Term Questionnaire.” The Incoming officer must look at the “Officers Roles and Responsibilities” and complete the “Future Plan Questionnaire.” Each officer must have these completed and in-hand during the retreat.

Retreat

Location: To be determined by chapter

Materials:

- White board or giant notepad to write on
 - Pens for officers
 - Markers for white board
 - Individual officer binders/records
1. *Opening and Welcome:* To be done by the Chapter Advisor, facilitator, or past president (Could be ritualistic)
 - Purpose: Talk about why we are here, why transitioning officers is important and how it helps the chapter.
 - Introductions, if needed.
 - Discuss how outgoing officers jobs are now mentors to incoming officers. Talk about the importance and impact of mentors on people.
 2. *Breakout #1: (form office pairs consisting of outgoing and incoming officer as breakout groups)*
 - Utilize and read “Officer roles and Responsibilities” to help understand office role better.
 - Instruct the outgoing officer to share with incoming officer advice, successful activities, office binder/records, incomplete activities and recommendations (use “End of Term Sheet”).
 - Instruct incoming officers to discuss plans and goals they have for their term in office (use “Future Plans Questionnaire”).
 - Instruct old officer to take notes for large group.
 3. *Large Group*
 - Have each incoming officer talk briefly about their goals/plans for their office (*Can be done lunch or dinner if needed)
 4. *Breakout #2*
 - Instruct each officer pair to identify chapter strengths and weakness.
 - Each pair should be taking notes to present to the large group.
 - Identify solutions and how that individual officer can help.

5. *Large Group:*

- Use the breakout groups' feed back to formulate goals for the chapter.
- Be sure to use the SMART model when setting goals:
 - i. *SMART Goals must be*
 1. *Specific*
 2. *Measurable*
 3. *Attainable*
 4. *Reasonable (ensure goal is a stretch that can be reached)*
 5. *Timely (set reasonable time tables)*
- Assign owners for the goals (i.e. pertinent officer).

6. *Closing*