

Officer Transition Retreat Guide

Successful chapters have successful officer transitions. Great transitions ensure shorter learning curves and better chapter performance. In addition to winning practices of fraternity/sorority leadership, these retreats should build team cohesion among the executive committee members and define the future desired state of being. This effort will allow the executive committee to develop an action plan, identify responsibilities for execution, and provide a guide to follow-through to achieving the vision. The following illustrates steps to an effective officer transition.

Planning the Retreat

Who should plan the retreat?

- Retreats are often more effective when a person who is not a member of the undergraduate chapter runs the retreat. A volunteer, faculty member, Headquarter staff, or member of the university staff may be better suited to facilitate than an undergraduate. Whoever is selected, it should be clear that there is one facilitator controlling the agenda and presiding over the business of the retreat.
- The outgoing president should be responsible for logistics and making sure everyone attends

Who should attend?

- All new and outgoing executive board members should attend as a basic expectation of the office
- Volunteers should be encouraged to attend
 - This is a great opportunity for volunteers to mentor undergraduates
- Invite the university Greek Advisor for a portion of the retreat. (The best chapters have good relations with the university)

Where the retreat should be held?

- Retreats should to be held at a location that is free from distractions so the sole focus is the retreat
 - Outside the chapter house is ideal (on campus or at the volunteer's home)
 - *Checking email, text messaging and phone calls should be prohibited*

When should the retreat be held?

- Plan two executive officer retreats annually
 - Transition Retreat - Held immediately after elections. Set the date prior to elections and require as a condition for taking office
 - Mid-Term Retreat – Held midway through the executive board's term, ideally right before the beginning of the new semester. Review goals and amend budgets and calendar

Supplies

- Pen & paper
- Markers, flip chart and easel (better than white/chalk board for record keeping)
- Masking tape
- University calendar and Leadership Continuum dates (EDGE and CLA)
- Past goal documents (chapter and individual)
- Recruitment and development Plans
- Frisbee, football, or similar recreational activity
- Copies of chapter budget and calendar

Handouts (Appendix)

- Appendix A – Pre-Retreat incoming questionnaire
- Appendix B – Pre-Retreat outgoing questionnaire
- Appendix C – SMART Goals
- Appendix D – Chapter goals handout
- Appendix E – Individual goals handout

The Retreat

Sample Schedule

- 10 - 30 min. Introductions** (*This is important if volunteers or guests are present*)
- 10 - 30 min. Ice Breaker & Team Builder**
- Use one that requires participants to move around and talk to one another
- 10 - 20 min. Identify Retreat Outcomes**
- Create a list of action items the group needs to accomplish during the retreat
- 15 - 30 min. “State of the Chapter”**
- Have everyone, undergrads and volunteers alike, answer the following questions.
 - “List three things the chapter does well”
 - “List three areas where the chapter could improve”
 - “List three obstacles the chapter needs to overcome to reach it’s goals”
- 1 - 3 hr. Old & New Officer Transition** (*Volunteer/mentor included if present*)
- Outgoing officers should hand over all notebooks, supplies, and resources
 - Complete or review the Pre-Retreat Questionnaires (*Appendix A & B*)
 - Review job description and expectations documents
- 1 hr. Working Lunch (Continue Officer One-on-One)**
- Excuse outgoing officers after lunch
- 15 – 45 min. University Expectations**
- Review University Policies
 - Development requirements, risk management procedures... etc.
 - Ask the Greek Advisor to come speak on these issues
- 1 - 2 hr. Executive Position Goals**
- Each executive position should set three to five SMART goals for the upcoming year
 - Provide SMART goals handout (*Appendix C*)
 - Handout individual goals worksheet (*Appendix E*)
- 1 -2 hr. Chapter Goal Setting**
- Set three to five chapter SMART goals.
 - Provide SMART goals handout (*Appendix C*)
 - Handout chapter goals worksheet (*Appendix D*)
 - Use the “State of the Chapter” exercise as a reference for goal setting
- 1 -2 hr. Recruitment Plan**
- Update Recruitment Plan (should have yearly plan)
- 1 -2 hr. Review Semester Budget and Calendar**
- 15 -30 min. Review Retreat Outcomes and Takeaways**
- 1-2 hr. Group Dinner or BBQ**

Retreat Follow-Up

Hold an All-Chapter Retreat (volunteer attendance is important)

- Gain buy-in for chapter goals (They must become the chapter's goals)
 - Post the goals around the chapter facility
- Host a recruitment workshop
- Review the chapter budget
- Distribute the chapter calendar
- Follow the chapter retreat with a brotherhood event
 - Go to the lake or beach, have a BBQ, go camping, paintball, Frisbee, golf...etc.

Executive Committee Follow up

- The chapter president should schedule weekly follow up meetings with each officer to review individual goals and progress
- Review chapter goals at each executive board meeting
- Setup a review retreat six months after the initial retreat. Schedule it before the semester/trimester begins.
 - Evaluate goals, update the budget, prepare calendar and update the recruitment plan

Incoming Officer Pre-Retreat Questionnaire

Bring this completed form to the officer transition retreat.

Name _____ Office _____

What are you looking forward to most about your new position?

What are you looking forward to least about your new position?

What did you like about the job your predecessor did?

How do you see yourself improving the position?

What skills will you need to be a successful leader and officer?

What obstacles will you have to overcome to be successful?

*****Prepare a list of questions for the outgoing officer that he can answer at the transition retreat.***

Outgoing Officer Pre-Retreat Questionnaire

Bring this completed form to the officer transition retreat

Name _____ Office _____

What do you wish you had known before taking this position?

What were you successful at this year?

Where could you have improved?

What recommendation do you have for the next officer?

What did you want to achieve in this position but were unable accomplish?

What was the best part about holding this office?

*****Prepare any resources that need to be passed onto the incoming officer BEFORE the transition retreat.***

Creating SMART Goals

From Paul J. Meyer's "Attitude Is Everything"

<http://www.topachievement.com/smart.html>

Specific — A specific goal has a much greater chance of being accomplished than a general goal. To set a specific goal, you must answer the six "W" questions:

Who?	Who is involved
What?	What do I want to accomplish
Where?	Identify a location
When?	Establish a time frame
Which?	Identify requirements and constraints
Why?	Specific reasons, purpose of benefits of accomplishing the goal

Measurable — Establish concrete criteria for measuring progress toward the attainment of each goal you set. When you measure your progress, you stay on track, reach your target dates, and experience the exhilaration of achievement that spurs you on to continued effort required to reach your goal.

To determine if your goal is measurable, ask questions such as: How much? How many? How will I know when it is accomplished?

Attainable — When you identify goals that are most important to you, you begin to figure out ways you can make them come true. You develop the attitudes, abilities, skills, and financial capacity to reach them. You begin seeing previously overlooked opportunities to bring yourself closer to the achievement of your goals.

You can attain most any goal you set when you plan your steps wisely and establish a time frame that allows you to carry out those steps. Goals that may have seemed far away and out of reach eventually move closer and become attainable, not because your goals shrink, but because you grow and expand to match them. When you list your goals you build your self-image. You see yourself as worthy of these goals, and develop the traits and personality that allow you to possess them.

Realistic — To be realistic, a goal must represent an objective toward which you are both *willing* and *able* to work. A goal can be both high and realistic. You are the only one who can decide just how high your goal should be, but be sure that every goal represents substantial progress. A high goal is frequently easier to reach than a low one because a low goal exerts low motivational force. Some of the hardest jobs you ever accomplished actually seem easy simply because they were a labor of love.

Your goal is probably realistic if you truly *believe* that it can be accomplished. Additional ways to know if your goal is realistic is to determine if you have accomplished anything similar in the past, or ask yourself what conditions would have to exist to accomplish this goal.

Tangible — A goal is tangible when you can experience it with one of the senses, that is, taste, touch, smell, sight or hearing. When your goal is tangible, or when you tie a tangible goal to an intangible goal, you have a better chance of making it specific and measurable and thus attainable.

Intangible goals are your goals for the internal changes required to reach more tangible goals. They are the personality characteristics and the behavior patterns you must develop to pave the way to success in your career or for reaching some other long-term goal. Since intangible goals are vital for improving your effectiveness, give close attention to *tangible* ways for measuring them.

Good Example: The chapter will reach the Phi Beta Kappa Wheelhouse this spring with a 3.15 GPA by raising its minimum GPA standard to 2.8 at the January retreat and recruiting a Faculty Fellow to assist new members with their academics.

Poor Example: The chapter will improve its GPA.

Chapter “SMART” Goals

As an executive board, develop goals that the chapter will rally around. Focus on creating three main goals. This will allow the chapter to concentrate on execution.

Goals	
Goal One	
Goal Two	
Goal Three	
Long-Term Goal	

Use the questions below to expand on each of the goals above.

What does the chapter want to accomplish?	
Who will be involved?	
Where will this take place?	
When will the goal be accomplished?	
How will the chapter measure progress and success?	
What are some requirements needed to achieve this goal?	
What are some potential obstacles that could stand in the way?	
Why is this goal important to the chapter?	
What benefits will the chapter receive by accomplishing this goal?	

Executive Position “SMART” Goals

Each executive board member should develop three goals that relate to their executive position or cabinet. Limit yourself to three main goals. This will allow you to concentrate on executing these goals.

Goals	
Goal One	
Goal Two	
Goal Three	

Use the questions below to expand on each of the goals above.

What do you want to accomplish?	
Who will be involved?	
Where will this take place?	
When will your goal be accomplished?	
How will you measure your progress and success?	
What are some requirements needed to achieve this goal?	
What are some potential obstacles that could stand in your way?	
Why are you aimed at this specific goal?	
What benefits will you receive by accomplishing this goal?	