**The Chapter Retreat: Transition Retreat**

**Goal:** To facilitate knowledge and process transfer of executive council

**Timing:** Within 30 days of elections/prior to new officers taking office

**Participants:** Outgoing officers, incoming officers, alumnus advisors

**Facilitator:** Alumni Advisory Board, MHQ representative, faculty advisor

**Location:** Off-site is preferred

**Tone:** Do not require attendance; encourage it (it’s *their* opportunity to express a voice)

Make it fun, but also make sure it serves a greater purpose.

**Agenda:** 3.5 Hours

Opening – 10 minutes

Ice Breaker – 15 minutes

Executive Board 101 – 30 minutes

Transition Breakout – 30 minutes

Goal Setting (Evaluation) / Chapter Calendar (*see: AAB Facilitated Retreat)* – 2 hours

Comments/Questions/Reflection

Closing

**Pre-Meeting: Preparation**

Prior to the transition meeting and to maximize time, the following tasks should be distributed to participants.

**Outgoing Executive Board:**

* Binder with notes from last semester
* Advice for the person taking over your position
* Two things you learned about your position while you were in office you wish you would have known prior to taking office
* A list of goals that are still in progress or suggested goals for next semester
* Notes from the last transition meeting

**Incoming Executive Board:**

* Your goals for your term in office
* Two things you think the person who held your position could have done better & how
* Something to take notes on
* Meet with any stakeholders about position processes (i.e. new initiates about new member program).
* Incoming secretary should be prepared to take notes on the meeting which will be needed for next transition meeting

**Step 1: Executive Board 101**

This section of the meeting is designed as an overview of executive board functions. Below is a list of possible conversation topics.

* **Consensus & Group Decision Making:** How to work as a team and present a united front while allowing tough conversations, conflict, and personal opinion. How decisions are made. Chapter political processes & how to build chapter consensus on tough issues. Servant Leadership.
* **Purpose of Meetings:** Purpose & execution of the following meetings:
  + Committee Meetings
  + Executive Board Meetings
  + Chapter Meetings
* **Constructive Criticism Process:** LCD conversation model of giving criticism (Like, Concerns, Dislikes).
* **Goal Setting & Retreat Tool Overview:** Review of the management tools that will be used for the retreat including S.M.A.R.T. goals, SWOT analysis, & GROW model *(see: Strategic Planning Handbook).*

**Steps 2: Transition Breakout**

Individual incoming officers, outgoing officers and advisors should break-out and discuss the agenda below. Information & materials should be transferred, successes and failures discussed, and notes taken so that a general assessment of chapter progress can be completed following the breakout.

* **Outgoing officer:**
  + Description of position (daily, weekly, quarterly, semesterly tasks)
  + Transfer & explanation of resources
  + What went well, what didn’t go well, what needs to change?
  + View of the next year
* **Incoming officer:**
  + What went well, what didn’t go well, what needs to change?
  + Questions for outgoing officer
  + View of the next year
* **Outgoing/Incoming/Advisor:**
  + Goal setting for officer position. (SMART, GROW)

**Step 3: Goal Setting (Evaluation) / Chapter Calendar**

At this point, all meeting participants should come back together. If the chapter does annual goal setting at the beginning of the academic year (and this is a midyear transition), then an evaluation/assessment of goals should be conducted. If no goals have been set for the year, please facilitate goal setting. At this time, a chapter calendar should also be developed with major events & meetings for the semester.

**Resources:** AAB Facilitate Retreat & Strategic Planning Handbook

**Define a few high-level focus areas for the semester**

**\***High-level focus areas are applicable to all areas of chapter operations- example: *accountability, engagement, organization.* What are your three overarching priorities for the semester?

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***\*****All advising, transition and goal setting resources* [*can be found here*](https://www.pikes.org/AdvisoryBoards.aspx?pid=6&spid=86)*.*