

Facilitating Officer Transition & Goal Setting

Helping the chapter get ahead

Why the AAB should help with transition & strategic planning.

WHY, BY THE NUMBERS

Top 10 Reasons to Facilitate

1. Biggest complaint: No officer transition
2. Engage your AAB: 6 month focus
3. Help the executive council to stay out of the weeds
4. Neutrality: Facilitating real change
5. Allows the president to be an active participant
6. Strategic priorities (boiling the ocean) & setting the right goals (10 => 25 man NM class)
7. Pay it forward: Them (skill) & You (occupational sanity)
8. Practice makes perfect: You do this in your job
9. Advisors are asked to help chapters with their student organization
10. Make sure it happens! *53% of active AAB's didn't host a retreat in 2014-2015...*

7 Things Facilitators Do:

1. Set the tone
2. Remain neutral
3. Manage the process
4. Keep members on topic
5. Summarize
6. State problems constructively
7. Assist in problem solving

Source: Marlene K. Rebur, University of Nevada

Assisting in knowledge transfer

FACILITATING TRANSITION

Pre-Meeting Preparation

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

E-Board 101

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:

- Committee meetings
- Executive board meetings
- Chapter meetings

Constructive Criticism Process:

- LCD model: Like, Concerns, Dislikes.

Goal Setting & Retreat Tool Overview:

- S.M.A.R.T.
- SWOT
- GROW

Officer Transition 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)

A professional vision for the *near* future

FACILITATING GOAL SETTING

OVERVIEW

Four questions every chapter should ask

1. Where are we now? *SWOT*



2. Why do we exist as an organization? *Mission & Vision*



3. Where do we want to be? *GROW*



4. How can we get there? *Strategic Plan*

1. SWOT

Internal	<u>Strengths:</u>	<u>Weaknesses:</u>
External	<u>Opportunities:</u>	<u>Threats:</u>

What strengths can you leverage to take advantage of external opportunities and quash any threats?

1. _____
2. _____
3. _____

2. Mission & Vision

Values: Main values projected by the organization, reflecting the organization's culture and priorities. (***The True Pike***)

Mission: Defines what the organization seeks to provide. A good mission statement describes purpose, why the organization exists.

Vision: Defines where the organization wants to be in the future. It reflects the optimistic view of the organization's future.

One of the Seven Habits of Highly Effective People is to '*begin with the end in mind.*' Our job as leaders is to articulate a clear and compelling vision to our members that will empower them to volunteer their best efforts.

Developing Vision: "What your team's purpose looks like when achieved with excellence."

The **Purpose** of the _____ Chapter is to:

1. _____
2. _____
3. _____

When we deliver our purpose effectively we will see the following outcomes (**Mission**):

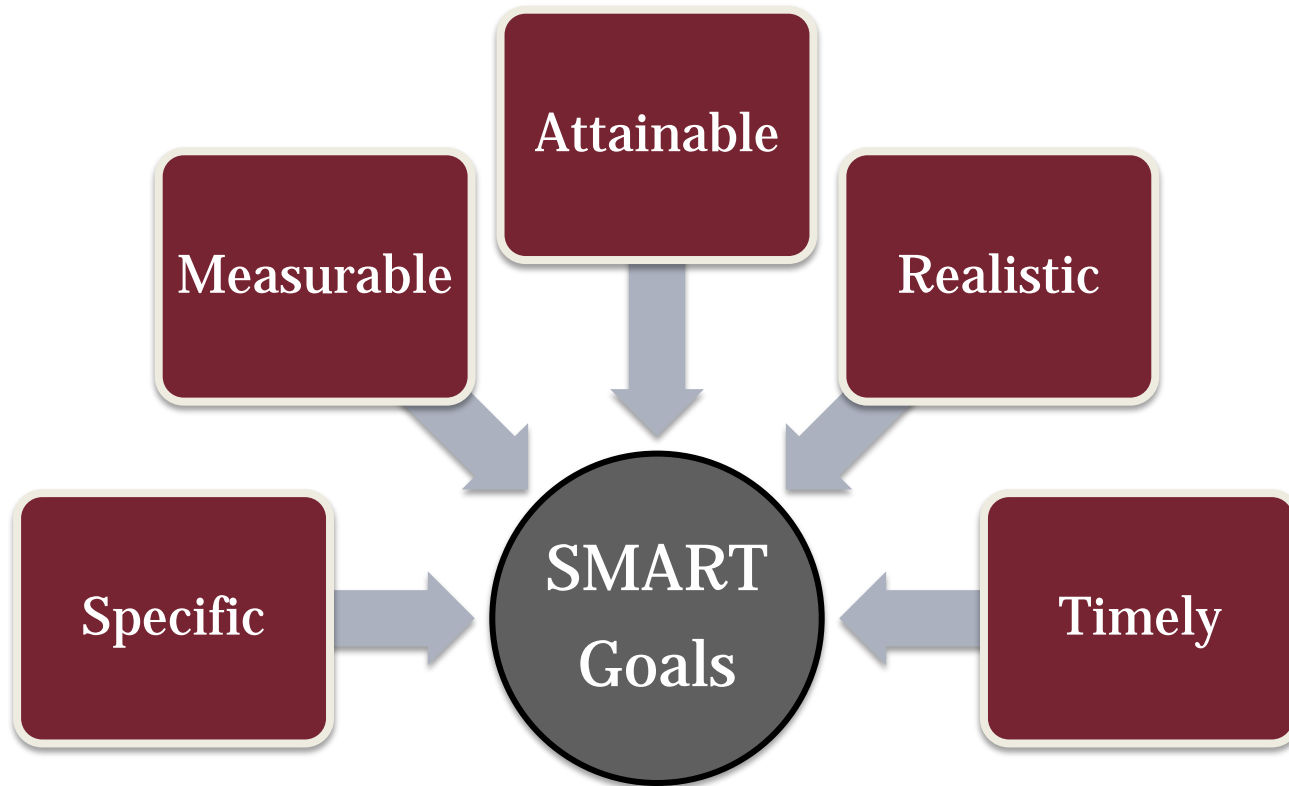
My **Vision** for our chapter is (combine purpose & outcomes): _____



2. Goal Setting via *GROW Model*



GOALS



REALITIES

Where do we stand on campus?

- Size
- Athletics
- Leadership
- Social Preference
- Act and Appearance
- Perception



What can we do to improve the realities?



Way forward

How do we get where we want to go?

- Organizing retreats
- Creating buy-in from active membership
- Developing action plans for each area of chapter
- Implementing these plans
- Setting deadlines for each action to be completed

Example: New Member Program

Goal

- Have all new members initiated within 8 weeks to ensure that the chapter retention rate of initiates is above 90%.

Realities

- Omega Omega initiated 10 of 16 men last fall and 4 of 7 last spring.

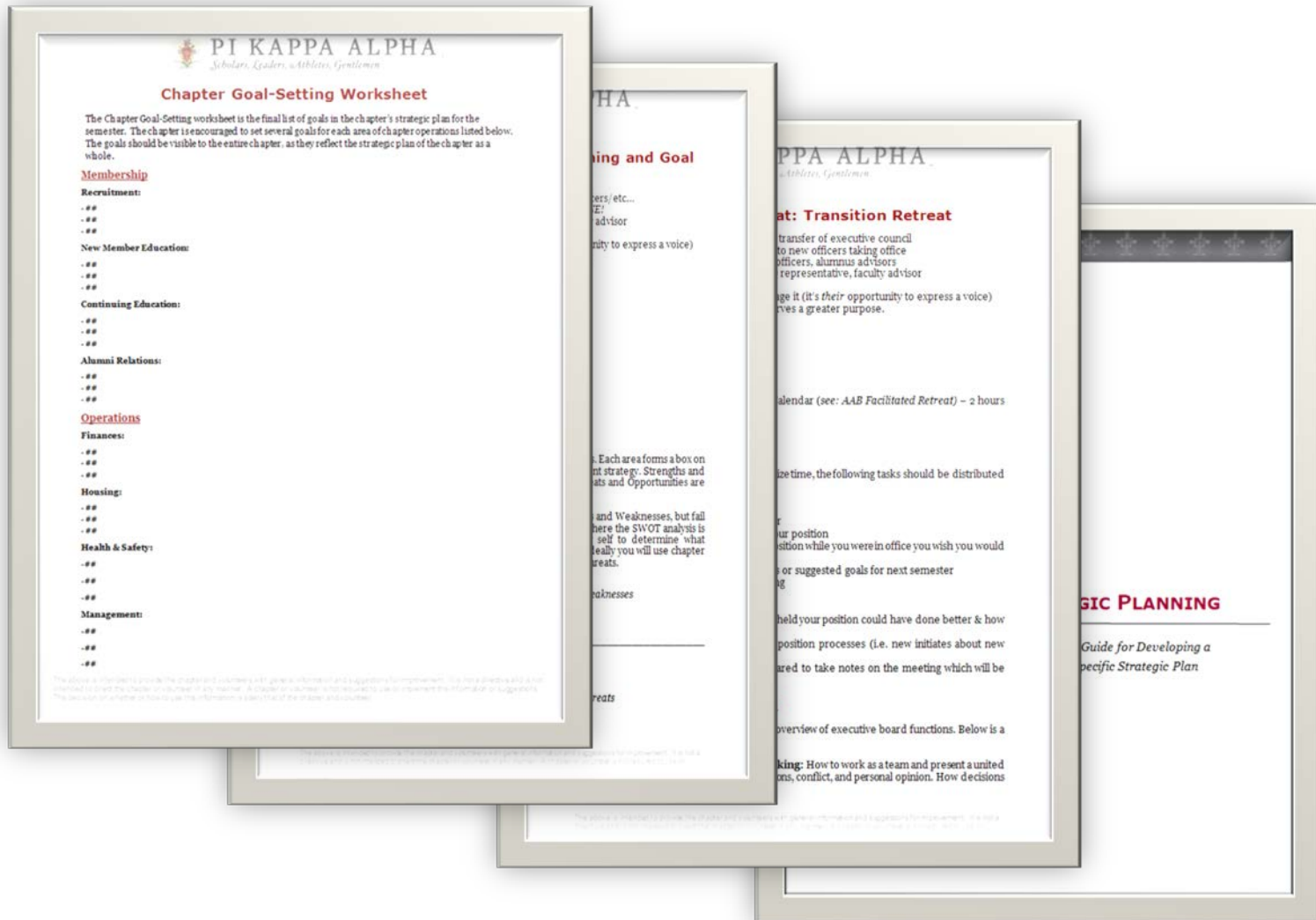
Options

- Continue with current new member education process.
- Decide to change membership's mentality.
- Develop a more structured process that is less strenuous on academics and time.

Way forward

- Develop a written new member education process of 8 weeks or less by *Month, Day*.
- Distribute and follow a calendar of events including new member officer elections, retreats, personal and professional development, and big brother/mentor program by *Month, Day*.
- Document all items from new member education process for consistent programming by *Month, Day*.

Tracking Documents



What are you taking back to your team?

BEST PRACTICE & IMPLEMENTATION