



Chapter Officer Transition Retreat

OFFICER RESOURCE MANUAL



Officer Transition Retreat Manual

Introduction

This manual is meant to serve as a resource to transitioning chapter officers. The following pages are a blueprint for how a successful retreat can be run. However, if there are certain areas that your chapter needs to focus on, the agenda can be tailored to address them.

4 W's of a Transition Retreat

Who: Both sets of incoming officers should be in attendance. In addition, it is a good practice to invite your chapter advisor and members of the alumni advisory board.

When: Hold your transition retreat between elections and the beginning of the new term. Since this retreat will take a fair amount of time, Saturday and Sundays tend to work the best.

Where: Try to plan your retreat off-campus. If that is not possible, at least try to hold it outside of the chapter house/homes of members. This will give a more professional feel to the meeting as well as minimize distractions.

Why: This meeting is meant to allow officer positions to continue to grow from year to year. Otherwise, officers will "Re-Invent the Wheel" and the chapter will be stagnant.

Officer Binders:

Before the retreat, each officer is expected to compile a binder that serves as a resource for the following year. Each binder should include:

- Position Description from the By-Laws
- University Policies
- Key Contacts
- Inter/National Officer Manuals (If Available)
- Calendar/Timeline
- Budget
- Goals (Past and Future)
- Hints/Ideas

These binders will be passed on and updated from year to year. They will also play a key role in the retreat itself. Set a due date for the officers to complete them a couple days before the retreat.

Supplies:

Flip Chart

Markers

Sticky Notes

Tape

Computer (Optional)

Projector (Optional)

To Print:

Agenda (1/person)

Facilitator Agenda (1)

SWOT analysis sheet (1)

Incoming/Outgoing Officer Surveys (1 each/position)

Officer Goal Setting Sheet (1/Incoming Officer)

Officer Transition Retreat Agenda

Date: _____

Chapter: _____

- I. Opening – 10 minutes
Begin by asking why transitions are important. After taking a couple answers, talk about how “re-inventing the wheel” each year will keep the chapter in an idle state. Transitions allow for the outgoing and the incoming officers to discuss what did/did not work and how to improve it the following year. Additionally, touch on the importance of the officer binders and how they will be used to help leaders even further down the road. One piece of advice for this first half is to separate the outgoing from the incoming board.
- II. Ice Breaker – 20 minutes
Choose your favorite ice breaker activity to get the group more comfortable with sharing things in front of the group. A personal favorite is “Highs and Lows.” The basic premise is to have members give their highest and lowest moment of the semester. Make sure to do the lows first, that way each person ends on a high note.
- III. SWOT Analysis – 1 hour
This is a great way to analyze the Strengths, Weaknesses, Opportunities and Threats of the chapter. See the attached documents for how to effectively run the activity.
- IV. Officer Surveys – 10 minutes
This activity will have every officer fill out a brief survey. There is a separate version for incoming and outgoing officers. These surveys are used as a jumping off point for the next section.
- V. 1-1 Transition Time – 20 minutes
This is the time for the outgoing and incoming officers for each position to come together to discuss the responsibilities of the position. Each set of officers should go through the officer binder and make sure to pay special attention to what events need to be planned and the position’s budget.
- VI. Lunch Break – 45 minutes

- VII. Chapter Goal Setting – 30 minutes
Discuss with the group the concept of SMART goals: Specific, Measurable, Attainable, Realistic and Timely. If you're unfamiliar with the concept, a quick Google search will give you all the information you need. After this, work with the group to construct SMART goals that deal with the entire chapter such as events, GPA, community service hours or campus involvement. Have the secretary make sure to record these goals.
- VIII. Officer Goal Setting – 30 minutes
Much like the chapter goal setting, each officer is going to create SMART goals specifically for his position. A good practice is to look at the chapter goals, and then develop individual goals based on achieving them. Once these goals are created they should be recorded by the secretary and included in that position's Officer Binder.
- IX. Calendar – 30 minutes
Before the retreat create large monthly calendars for the semester and collect a list of holidays/school events. To begin this section, begin by brainstorming a list of events and obligations the chapter has. Once this is completed, have each officer write the events they're responsible for on sticky notes and place them onto the calendars. After all the events on the list are on the calendar, have a discussion with the officers about each event. If there are conflicts, the sticky notes can easily be moved. Even if members are unsure about potential events, it is better to put them on the calendar.
- X. Budget – 30 minutes
This section is designed to set a preliminary budget for the semester. See the attached sheet for how to effectively do this.
- XI. Officer Expectations – 10 minutes
Use this time to talk with your officers about their expectations. This should include attending chapter and executive board meetings.
- XII. Comments/Questions/Reflection
Do a "Gavel Pass" to allow members to share anything they think or feel. If your group needs help opening up, prompt them with a question such as "what part of this retreat will be the most helpful going forward".
- XIII. Closing
Make sure the room is clean before you leave. It is a good practice to send Thank-You's to all parties involved. Take all the flip chart pages and display them somewhere prominently.

Sample Officer Retreat Agenda

Date: _____

Chapter: _____

- | | | |
|-------|-------------------------------|------------|
| I. | Opening | 10 minutes |
| II. | Ice Breaker | 20 minutes |
| III. | SWOT Analysis | 1 hour |
| IV. | Officer Surveys | 10 minutes |
| V. | 1-1 Transition Time | 20 minutes |
| VI. | Lunch Break | 45 minutes |
| VII. | Chapter Goal Setting | 30 minutes |
| VIII. | Officer Goal Setting | 30 minutes |
| IX. | Calendar | 30 minutes |
| X. | Budget | 30 minutes |
| XI. | Comments/Questions/Reflection | |
| XII. | Closing | |

SWOT Analysis

"If you do not know where you are going, any road will get you there." We use this famous quote because chapter planning can be an easy way to improve common chapter issues. Does your chapter struggle to stay in the black financially? Does your chapter underachieve academically? Does your chapter lack community service hours?

If this sounds like your chapter, maybe it's time to take a long, hard look at your operations to determine where you are and where you want to go. Maybe it's time for a SWOT analysis. What's a SWOT analysis?

While it may sound like a trendy corporate buzz phrase, SWOT analysis is a time-tested integral part of the strategic planning process. SWOT is an acronym for strengths, weaknesses, opportunities and threats -- the factors that can determine a chapter's success or failure. Strengths and Weaknesses are factors that are internal to a chapter, such as core competencies, resources and organizational culture. Opportunities and threats are external forces, such as competition, the economy, and social or political environments. SWOT analysis is the process of identifying and assessing these factors for the purpose of establishing an honest and realistic picture of your chapter. The analysis is then used to lay the groundwork for a strategic plan that capitalizes on strengths and opportunities and minimizes weaknesses and threats.

Why do you need a SWOT analysis? If you are the president or an officer in a chapter, you may think you already have a pretty accurate view of where your organization stands. But are you sure your members share that perspective? How about your alumni's view? The value of a SWOT analysis is that it provides a framework for evaluating your chapter objectively. Because SWOT analysis requires thinking beyond the normal parameters of the chapter, it often reveals hidden vulnerabilities or unique strengths of which officers and members were previously unaware. By painting a clearer picture of the situation, it is easier to understand the challenges that the chapter faces and the best methods for overcoming them. That's not to say that SWOT analysis is only valuable when an organization is having problems. There's no better time to conduct a SWOT session than when things are going well. To ensure continued success, you need to know how to position your chapter to take advantage of every opportunity, to optimize your member's abilities and resources and to prevail in any climate. No matter what stage of development your chapter has reached, strategic planning can help it get to the next level.

SWOT Questions:

STRENGTHS: Define areas you excel in.

- What does your chapter do well?
- How strong is your chapter on campus?
- Does your chapter have a clear strategic vision?
- Does your chapter's culture produce a positive environment?

WEAKNESSES: Evaluate your liabilities.

- What could be improved at your chapter?
- What does your chapter do poorly?
- What should be avoided?
- Does your chapter struggle with financial management and debt?

OPPORTUNITIES: Analyze your members, the student body and your campus.

- What favorable circumstances are you facing?
- What are the interesting trends? Is your chapter positioned to take on those trends?
- Is your chapter recruiting new types of students?

THREATS: Check out what your competitors are doing and assess other potential challenges

- What obstacles do you face?
- What is your competition doing?
- What policies and laws are being implemented that may affect your chapter?

Outgoing Officer Evaluation

Name of Outgoing Officer:

Position:

Date:

List three things during your term in office that were considered most important: 1.

2.

3.

List three things you wish you had done during your term in office: 1.

2.

3.

List three important "pieces of advice" for the incoming officer: 1.

2.

3.

List any outstanding items that still need completion prior to your leaving office:

As outgoing _____ (officer title), I promise to assist the newly elected officer in any way I can.

Outgoing Officer Signature:

Date:

Incoming Officer Evaluation

Name of Incoming Officer:

Office:

Date:

List three things that made you want to run for this office and why: 1.

2.

3.

List three new ideas that you would like to implement for your office this year: 1.

2.

3.

List three important foreseeable problems in your office: 1.

2.

3.

List possible solutions to the above three problems:

As incoming _____ (officer title), I promise to ask the assistance of the outgoing officer or president when I need help.

Incoming Officer Signature:

Date:

A Brief Guide to SMART Goal Setting

A SMART goal is a goal that is specific, measurable, attainable, relevant, and time based. In other words, a goal that is very clear and easily understood.

SPECIFIC

The goal must clearly state what is to be achieved, by whom, where and when it is to be achieved. Sometimes it may even state why that goal is important. Not all of these questions will apply to every goal, but it is important to ask all the questions in order to assess how specific your goal is and make it as clear as possible.

MEASURABLE

Measurability applies to both the end result and the milestones along the way to attaining a goal. It answers the question of quantity – how much, how often, how many? The milestones are signs along the way that will tell you that you are on the right track to achieving your goal.

For instance, your ultimate goal may be to make \$60,000 in a year, but the milestones may be to make \$5,000 every month, which will add up to \$60,000 in a year. So by focusing on making the \$5,000 every month you will ultimately reach your goal of \$60,000. This makes the goal more attainable because it is easier to think of ways to make \$5,000 every month than \$60,000 all at once.

It has been said that what cannot be measured cannot be managed. This is often true when it comes to goals. Sometimes it is difficult to measure a goal, but at such times there is usually an indirect measure that can be applied.

ATTAINABLE

You should ensure that the goals you set are achievable. First of all, you must believe that you can accomplish what you are setting out to do. If you set goals that are unbelievable even to yourself, it is very unlikely you will achieve them. This is equally important when setting goals for a group, such as in the corporate setting. If the people for whom the goals are being set do not believe they are attainable, it is unlikely they will work wholeheartedly towards achieving them.

REALISTIC

Your goals must be relevant to what you want to achieve in the short term and the long term. Understanding your organizational or personal vision, mission and purpose is critical in this respect.

Sometimes you can be tempted to do something simply because it is easy and sounds great, only to discover later on that it has no long term importance to what you want to achieve as an individual or an organization. Do those things that are most important and in line with your long term vision and mission

TIMELY

This sometimes overlaps with the goal being Specific, but it aims to ensure that you put a timeframe to your goals. Someone said a goal is a dream with a timeframe to it. Simply deciding by when you want to achieve something can be a good motivator. It can prevent you from procrastinating because you know that you are working towards a deadline.

“Failing to plan is planning to fail”

If you find yourself unable to set a SMART goal it is more than likely that your future plans are not clear enough and need to be addressed. Furthermore do not get tempted to skip the process of SMART goal setting and “get on with it” without fully analyzing your goals.

Doing this careful planning at the beginning will save you lots of time and disappointment at a later stage and you will avoid making costly mistakes.

OFFICER GOALS – S.M.A.R.T.

S.M.A.R.T. is an acronym for Specific, Measurable, Attainable, Realistic, and Timely. These characteristics should be found in all officer and individual goals. Goals and objectives are important because they give the chapter/colony and its officers a road map to follow towards achieving the overall vision. Below are a few questions that will assist each individual and officer in creating their own S.M.A.R.T. Goals.

Goals: Broad Questions

What are you trying to *achieve*? How can you take *ownership* of your Fraternity? What needs to be done? How can you make Phi Delta Theta better?

Objectives: Action Plan

What steps should be taken to achieve the goal? Who could help me in achieving this goal? What resources do I need?

SMART Goal:		
Objectives	Descriptions	Due Date
#1		
#2		
#3		
#4		

SMART Goal:		
Objectives	Descriptions	Due Date
#1		
#2		
#3		
#4		

SMART Goal:		
Objectives	Descriptions	Due Date
#1		
#2		
#3		
#4		

SMART Goal:		
Objectives	Descriptions	Due Date
#1		
#2		
#3		
#4		

SMART Goal:		
Objectives	Descriptions	Due Date
#1		
#2		
#3		
#4		

Budget Planning

Setting a budget is imperative in planning for a successful semester. Successful chapters tend to build a cushion into their budget for unforeseen circumstances.

Income:

Roll-over from previous semester	_____
Membership Dues (# of members)	_____
Alumni Donations	_____
Other	_____
Total	_____

Expenses:

_____	_____
_____	_____
_____	_____
_____	_____
Total.....	_____

Income Total – Expenses Total.....

The number generated is the total amount of money that can be allocated to other areas.

These areas can include:

- | | |
|---------------------------------|-----------------------------|
| - Philanthropy | - Community Service |
| - Recruitment/Intake Activities | - Intramurals |
| - Alumni Events | - Brother/Sisterhood Events |
| - Social Events | - Public Relations |
| - Homecoming | - Supplies |
| - Greek Week | - Apparel |
| - Scholarship Program | - Composite Picture |
| - Miscellaneous | |