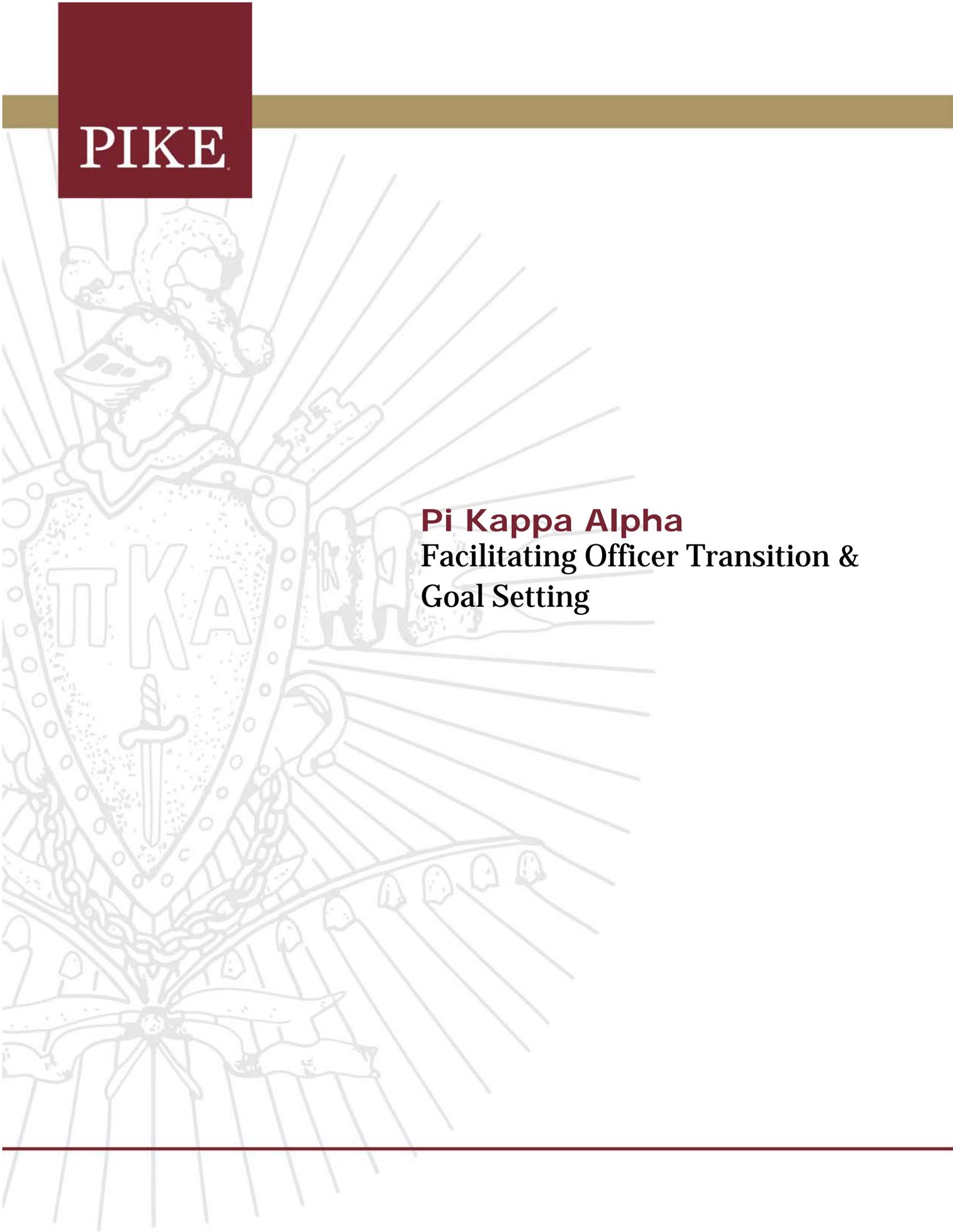


PIKE



Pi Kappa Alpha
Facilitating Officer Transition &
Goal Setting

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:

The above is intended to provide the chapter with general information and suggestions for improvement. It is not a directive and is not intended to direct the chapter in any manner. A chapter is not required to use or implement this information or suggestions. The decision on whether or how to use this information is solely that of the chapter.

- 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 at www.pikes.org.*

The Chapter Retreat: Strategic Planning and Goal Setting

Goal: To improve brotherhood and set goals for the chapter/officers/etc...

Timing: Beginning of semester / after elections / *JUST HAVE ONE!*

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: 3:30 plus activity.

Opening – 10 minutes

Ice Breaker – 15 minutes

Step 1: The Chapter Assessment- 30 minutes

Step 2: Vision, Mission, and True PIKE Review- 30 Minutes

Step 3: Goal Setting Breakout- 45 Minutes

Step 4: Strategic Plan- 60 Minutes

Comments/Questions/Reflection

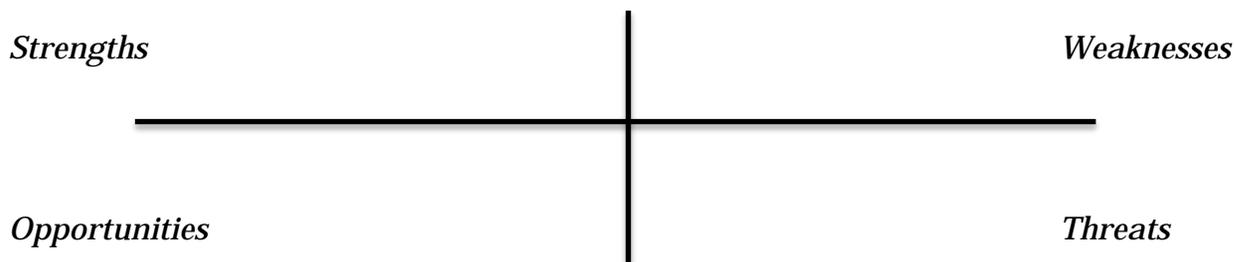
Closing

Step 1: The Chapter Assessment

The SWOT Analysis

SWOT stands for: Strengths, Weaknesses, Opportunities, and Threats. Each area forms a box on a grid and you fill in each section to help formulate your assessment strategy. Strengths and Weaknesses focus internally on what the organization can do. Threats and Opportunities are external factors.

Many organizations may find it easy to look inward and see Strengths and Weaknesses, but fail to look outside at the external Opportunities and Threats. This is where the SWOT analysis is helpful. It challenges the organization to see beyond its inner self to determine what opportunities are there and how the use these on the strengths. Ideally you will use chapter strengths and outside opportunities to leverage weaknesses and threats.



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Steps 2: Define the Organization's *Values* and Set its *Mission* and *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.

Step 3: Goal Setting (Break Out)

To view chapter checklist for operational goals, click [here](#)
Committee/chairmen individual goal setting using the GROW Model

Goal- What is our end goal? Where do we want to be?

Reality- Where are we now? How far are we from our end goal?

Options- What are the possible options for reaching our objective?

Way Forward- After analyzing our options, what are the action steps that will take us to our final goal?

Step 4: Strategic Plan

Presentation of chapter goals and objectives for the areas of:

Membership

Operations

Brotherhood

Leadership

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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Facilitating Transition & Goal Setting: Where you stand

Does the chapter you advise currently have transition & goal setting retreats?

Yes

No

Are advisors involved in the process?

Yes

No

If yes, how are your meetings structured / when do they occur / what do results look like?

If no, what are the top three things you can do to help the alumni advisory board incorporate and help facilitate transition and goal setting retreats?

1. _____

2. _____

3. _____