

## **OFFICER TRANSITION RETREAT AGENDA TEMPLATE**

An Officer Transition Retreat should be held after elections and before Officer Installation. All outgoing and incoming officers should be in attendance.

If possible, Chapter Council members and the GCA should be involved in the planning/ facilitating of the retreat.

### **ADVISOR INTRODUCTIONS (10 MINUTES)**

- All advisors introduce themselves, talk a little bit about their background (professionally and fraternally), and discuss what position they advise on the Chapter Council.

### **YEAR IN REVIEW (60 MINUTES)**

- The outgoing President leads a review of the End Statements established by the Prudential Board and the goals established by the Chapter, including a progress update (20 minutes).
- The outgoing VP of Communications leads a review of the calendar for the past year (20 minutes).
- The outgoing VP of Finance leads a review of the chapter's financial condition including a summary of budgeted versus actual expenses (20 minutes).

### **PANEL (30 MINUTES)**

- Outgoing Prudential Board members participate in a panel discussion to allow incoming officers the opportunity to ask transition related questions.

### **BREAK (10 MINUTES)**

### **OFFICER TRANSITION (60 MINUTES)**

- Outgoing officers pass along all transition materials (see Transition Checklist) to the incoming officer.
- Outgoing officers provide a high-level overview of the position (important dates and deadlines; budget information; calendar of events related to the position; what went well; what didn't go well; unfinished projects; important people to know, etc.).

### **CHAPTER COUNCIL, IF APPLICABLE (40 MINUTES)**

- Chapter Council members spend time individually with the officers that they advise. Outcomes of this initial meeting should include: exchanging contact information, discussing mutual expectations, setting date for first one-on-one meeting, and beginning to form a positive relationship.

### **PANEL (30 MINUTES)**

- An informal meal with the Chapter Council members and incoming officers so that relationships can begin to be developed.