Sample Retreat Schedule – Officer Transitions

Officer meetings

- New/old officers pair off (president with president, treasurer with treasurer)
- Update each section of notebooks, or talk about what should go in a new one. If officers do not have a notebook, take the time to create one!
- Each pair of officers should discuss the following:
  - Who did the outgoing officer interact with most in the administration, in the community, and other student organizations?
  - With the departments/areas listed above, what capacity did the outgoing officer work with them on?
  - What University paperwork is this position responsible for completing?
  - What did the outgoing officer have to do with the organization’s funding requests (assuming this question applies to your group)?
  - What University procedures did the outgoing officer have the most trouble with and how can the incoming officer avoid those troubles?
  - What were the biggest challenges the outgoing officer faced and how did they overcome them?
  - What goals did the outgoing officer have, and which were achieved and which were not.

Joint officer meeting

- Gather as a group; write everyone’s notes on a board or flip chart. Note similarities.
- Generate a discussion on similarities, challenges and how challenges can be overcome.
- Review policies.

New officer meeting (This could be a separate meeting, or the next phase of the retreat.)

- Goal review. What did the past officers accomplish?
- What is left to do from the past goal list? Revise list or eliminate it if the officers choose.
- Provide new officers time to list goals for their position on their own.
- Reassemble and share updated goals.
- Brainstorm new goals for the organization and ideas for programs, fundraisers, and social events.
- Make an exhaustive list of everything the group could possibly accomplish.
- Narrow down that list to what they can reasonably accomplish. Assign tasks to specific officers. If no one wants to do it, take it off the goals list.

Adapted from ACPA Advisors Manual 6.2009