

## **OFFICER TRAINING/TRANSITION RETREAT GUIDE**

This guide provides a list of items officers may wish to cover during a workshop retreat and an approximate number of minutes each item might require. You may need to add additional items to your workshop agenda, and you should arrange the items in the order most appropriate for your individual group.

### **Introductions**

Be sure to introduce any guests. Officers also should introduce themselves, even if you believe they already know the guests and other attendees.

### **Review Goals of Workshop (10 minutes)**

Note: This is not a time to debate or change the goals or timeline of the retreat. They must stay as planned. If officers wish, plan a separate meeting to discuss critical issues that have surfaced.

### **Icebreaker and/or Team-Building Exercises (10–40 min.)**

Officers may not know one another as well as they think. Have an outside facilitator conduct personality profile or leadership style evaluations, decision-making practice, or communication exercises. It is important that this time is spent delving beyond the surface of individuals' hometown, major, etc.

### **Group Development**

#### **Establish Expectations of Officers and Members (15–45 min.)**

Comparable to getting settled with a new roommate, officers must establish early a certain level of expected behavior from one another.

#### **Establish Expectations of Counselor (10–20 min.)**

Just as officers establish expectations among themselves, they also let their counselor know what they expect of him or her and what the counselor should expect of the officers.

### **Policies and Procedures**

#### **Review Organizational Policies and Procedures (10 min.)**

Constitution and Bylaws, calendar of programs, and deadlines

#### **Review Campus Policies and Procedures (10–20 min.)**

Facility scheduling, reports and forms, event/program planning, financial guidelines

### **Operating Policies and Standards**

#### **Meetings and Parliamentary Procedure (10–15 min.)**

Announcing meetings, meeting environment, making motions, taking minutes, evaluating meetings

#### **Officer Reports (10 min.)**

Verbal vs. written reports for chapter meetings, KDP Headquarters reports, committee reports, etc.

### **Strategic Planning**

#### **Establish Organizational Goals and Objectives (45 min.)**

Affirm organizational mission and purpose  
Determine priorities

Establish objectives and tasks relative to goals

**Establish Personal Goals and Objectives (30 min.)**

Affirm role/responsibilities of position

Determine priorities

Establish objectives and tasks relative to goals

**Closing**

**Establish Timeline/Deadline for Follow-Up Workshop (5–10 min.)**

Conduct written evaluation