

FACILITATOR'S GUIDE: OFFICER TRANSITION RETREAT

PREPARATION

Review these tasks to ensure you're prepared to facilitate a successful retreat:

1. Review the "supplies" section in "Step 4: Incoming Officers Retreat" to ensure you have everything listed under "facilitator should bring".
2. A week before the retreat, send all attendees an email with retreat details and a list of what they need to bring (See the "incoming officers should bring" section in "Step 4: Incoming Officers Retreat").
3. Provide snacks and/or a meal to keep participants engaged and motivated.
4. Read through this entire facilitator's guide well in advance to ensure you're prepared.

FACILITATOR GUIDELINES

Review these best practices to help you prepare for the retreat:

- **Set honesty standard**
 - Let them know that 'what is said in this room stays in this room'
 - Let them know the only way to get the most out of this process is to have full disclosure.
- **Keep them on track!**
 - It is important to have a strong moderator. Beneficial discussion should not be interrupted, but tedious and repetitive discussion should be avoided.
- **Encourage "balanced" participation**
 - Make sure each officer is providing input, even if the topic is not their area of expertise or direct responsibility.
- **Be conscious of time**
 - You have a limited amount of time to get through a lot of agenda items.
- **Take a hands-on role in SMART Goal Setting**
 - Newly elected leaders often bite off more than they can chew. Realistically, two-three objectives for a one-year term is the most change/improvement we should expect to see from an officer. It's important for the facilitator to properly narrow the scope of a newly elected officer chock-full of fresh ideas in order for that officer to be effective.
- **Build "team builders" into the agenda**
 - Find some team building activities to start the retreat to build a collaborative environment.
 - Insert icebreakers and games throughout the day to give officers mental breaks and keep them sharp and stimulated.
 - [This website](#) has some great suggestions.
- **Finish the job**

- Ensure you and the chapter officers complete “Step 5: Follow Through” and “Step 7: Take Advantage of the Carlson Leadership Academy”.

INTRODUCTION (10 MINUTES)

Introduction:

Our work today determines our success at the end of your terms in office. Focus, attention to detail and energy will ensure we maximize our time together.

Instructions:

1. Review agenda for the day.
2. Ask the group, “Why is today important?”
3. Have each officer answer the question, “What do you want to get out of today?” Capture their answers on a flip chart and hang it up.
4. Have the group commit to “ground rules” and capture their answers on a flip chart and hang it up. Examples include, but are not limited to:
 - a. No cell phones.
 - b. Be honest.
 - c. Respect others’ opinions.
 - d. Be conscious of time and stay on track.

5. To help set the tone for the day, read a portion of the officer installation ceremony from the *Public Ceremonies of Sigma Phi Epsilon Fraternity*:

You are the newly chosen leaders of _____ Chapter of Sigma Phi Epsilon. In your hands largely rest the destinies of your chapter during the coming year. Your brothers have expressed their respect for your ability and their confidence in your integrity. We look to you for guidance, direction, and leadership.

Your leadership shall assure that harmony and cooperation shall always prevail among us. Your spirit of service, your devotion to duty, your willingness to serve and sacrifice will be the qualities that give force and direction to our aims and aspirations.

May your terms in office come to the close with these words surging in your hearts: “Well done, thou good and faithful servant; thou hast been faithful over a few things: I shall make thee a ruler over many things.”

6. Ask them a few processing questions:
 - a. *What are your thoughts or emotions after hearing this?*
 - b. *Notice that it references the end of your term in office ... why is this important to think about now?*
 - c. *How does this apply to our work for today?*

TEAM MOTTO (40 MINUTES)

Introduction:

As we just read in the officer installation ceremony, your brothers have elected you because they believe in your leadership. Great leaders have a team motto. You're going to be faced with difficult decisions. You and your fellow leaders need a guiding motto to fall back on at all times. This motto establishes a philosophy for your team and should drive your day-to-day actions and long-term vision for the chapter.

Instructions:

1. Ask some guiding questions to spark discussion and create buy-in to this activity:
 - a. *Why create a team motto? What role does it play?*
 - b. *Why define our purpose in words? What are the benefits that this provides?*
2. Watch the first six minutes of Simon Sinek's TED Talk ["Start with Why"](#)
 - a. Explain to the leaders that this clip will lay a foundation for their team motto.
3. After watching the clip, lead a group discussion:
 - a. Ask the group, *"What were your biggest takeaways from this video?"*
 - b. Have participants review the [Golden Circle Handout](#) and help them understand this concept.
 - c. As a group, ask them to define the "what" and "how" of their chapter.
4. With this in mind, now ask them to focus on the "why" individually. Ask each member to take a couple of minutes to write down what he thinks is the "purpose, cause or belief" that drives his leadership of the chapter.
5. Have each member share what he wrote and the facilitator will capture key phrases and common themes on a flip chart.
6. Using the facilitator's notes on the flip chart, the group will work together to create a cohesive team motto for the upcoming year.
 - a. The "why" statements should drive the creation of their goals.
7. Write the completed team motto on a flip chart paper and hang on the wall.
8. Ask some concluding thoughts to wrap up the discussion:
 - a. *Why should this guiding motto be reviewed at each executive board meeting this year?*
 - b. *The road to success is always under construction. What obstacles will stand in the way of achieving this vision?*
 - c. *How can we overcome these obstacles?*

FACILITATOR NOTE: Here are some examples to fall back on if the group needs guidance or is starting to veer off track:

- *Our chapter will be the best student organization on campus.*
 - Pushes them to reach towards a lofty goal.
- *This chapter will be on campus when our sons come to college.*
 - Forces them to think long-term.
- *Our work will cultivate values-based men that will improve the world.*
 - Inspiring charge that reminds them of the purpose of their work.

PROCESS OVERVIEW (5 MINUTES)

Introduction

With the help of outgoing officers and mentors, you've spent a lot of time planning for the upcoming year. It's time to put that planning to work. The goal of the rest of this retreat will be to set goals for the upcoming year. Before we dive in, it's important to understand how this process will work. It is broken up into four stages:

1. **Evaluation** - The question is *"Will we be better this year than we were last year?"* Each officer will do an honest evaluation of past performance to help us determine future goals.
2. **Prioritization** - There's an endless list of things we can accomplish, we must narrow down what each officer will focus on.
3. **SMART Goal Setting** - For each priority, we must develop SMART goals and accompanying action plans to help us achieve these goals.
4. **Follow through** - The first three steps of this process are wasted unless each officer looks back on the material often, and holds each other accountable for achieving your goals.

At the end of this process, each officer should have identified their top three priorities and created SMART Goals and accompanying strategies to address the priority areas.

ACTIVITY: THE PROBLEM PYRAMID (20 MINUTES)

Introduction

Explain that the first portion of this process is an in-depth evaluation of each area of operation. Each officer should understand this guiding philosophy as they assess their area: *"An accurate description of the problem is 90 percent of the solution."*

Instructions:

1. Write the quote *"An accurate description of the problem is 90 percent of the solution."* on a flip chart.
2. Ask the group these processing questions:
 - a. *What does this quote mean?*
 - b. *Why is it important for us to remember as we go through this process?*
3. Have participants review the [Problem Pyramid Handout](#) and help them understand this concept.
 - a. Make sure they understand how the surface level issues lead to the root issue of "misalignment with the Ritual and Values".
4. Ask the group these processing questions:
 - a. *Do you "buy" the problem pyramid? Is it realistic?*
 - b. *What are the surface level issues in our chapter?*
 - c. *Why is it easy to see the surface level issues in your chapter, but difficult to understand the critical issue?*

- d. *How often do we examine the root issue in our chapter? Why?*
 - e. *How might a strong commitment and alignment to our Ritual and values impact our chapter?*
 - f. *How can we use this concept as we go through the rest of our process?*
5. Explain to the chapter leaders that they should keep this graphic and concept in mind as they examine their area of operation. Challenge them to gain an “accurate description of the problem” and address the root issue with their solutions.

EVALUATIONS AND PRIORITIZATION (140 MINUTES)

Introduction:

Using the completed transition materials, each officer must evaluate their area of operation. This process will lay the foundation for setting SMART Goals and building action plans.

Instructions:

1. Show participants the completed *Example - Evaluation and Prioritization Worksheet*.
 - a. Explain that this example is meant to show them the type of information that should go into this worksheet.
 - b. Ensure they understand the work they need to complete a comprehensive review of their area of operation.
 - c. Explain that each officer should be using their answers from the “Preparing for My Term” section of the *Incoming Officer Worksheet*.
2. Each officer will spend 20 minutes completing the *Evaluation and Prioritization Worksheet* individually.
3. After completion, each officer should give a three-five minute presentation on their completed worksheet with the group.
4. Allow the other officers to give feedback after they walk through their presentation focusing on each officer’s top three priorities.
5. Allow officers to go back and adjust priorities based on the feedback they receive.

To help each officer set goals in these priority areas, we should dive into each priority individually. Robust and creative discussion will help each officer create comprehensive SMART Goals and action plans that address the most pressing issues in their area of operation.

Instructions:

1. Each officer will read their first priority to the group.
2. Spend two minutes on each priority answering the question:
 - a. *What are tangible things we can do to improve this area of operation?*
3. As the group gives feedback, have the officer owning this priority take detailed notes in a word document on his computer.
4. Repeat for the next two priorities.
5. Move to the next officer.

SMART GOAL SETTING (90 MINUTES)

Introduction:

Now that we've established clear priorities and have feedback, it's time to build SMART goals for each priority and accompanying action plans.

Before setting goals, let's review what SMART goals are and how to create them.

Instructions:

1. Walk officer through the [SMART Goals and Action Plans Resource](#). Ensure all officers understand how to create SMART Goals and accompanying action plans.

Now that everyone understands how to create SMART goals and action plans, it's time to create one for each priority.

Instructions:

1. Ensure each officer has downloaded a copy of the [SMART Goals and Action Plan Worksheet](#) to his computer.
2. Walk them through how to build out this resource.
 - a. Make sure they understand this document has three tabs, one for each priority area.
 - b. Make sure they know they should be using their completed [Evaluation and Prioritization Worksheet](#) and the detailed notes during the group discussion on their priorities to create a SMART goal and accompanying action plan for each priority.
3. Show them the completed [Example - SMART Goals and Action Plan Worksheet](#) that outlines the BMS example.
 - a. Ensure they know this isn't a comprehensive list of tasks to complete this SMART goal, it's just a small list to give them an idea of what it looks like.
 - b. Show them how this example went from a SWOT analysis on chapter recruitment to a SMART Goal and action plan for the Balanced Man Scholarship.
4. Each officer should spend 30 minutes completing a [SMART Goals and Action Plan Worksheet](#) for each of their priorities.
5. After completing this worksheet, put officers in groups of two or three and have them spend 15 minutes reviewing a peer's completed [SMART Goals and Action Plan Worksheet](#) and provide them feedback on what they could improve.
6. Give each officer 10 minutes to implement peer feedback and finalize their SMART Goals.

CONCLUSION (20 MINUTES)

Introduction:

We've covered a lot in one day. Let's recap our key takeaways and look to next steps.

Instructions:

1. Review the team's guiding motto.
 - a. Give the chapter president this flip chart and ask him to hang on the wall of the executive board's office or designated meeting area.
2. Review the "Step 5: Follow Through" section of the transition resource on page 10.
 - a. Based on the steps outlined in this section, have each officer write down the work they need to do.
 - b. Make sure they set clear ownership and deadlines for each action item.
3. Stress the importance of following through and highlight that without action, all of this work is just words on paper. Then, ask each participant to answer the following questions:
 - a. *What are the immediate action items that need to be completed in the next week?*
 - b. *What is your top takeaway from the day?*
 - c. *What are you most excited about this next year?*
4. Set a specific date to meet and revisit SMART Goals and action plans.
5. After the retreat, send an email to chapter officers:
 - a. Thank them for their hard work and commitment.
 - b. Include a list of follow-up items based on steps in "Step 5: Follow Through" section and specific items discussed at the retreat.
 - c. Reminder of the date set to meet and revisit SMART Goals and action plans.
 - d. Provide some inspirational words to empower them.