

SAMPLE OFFICER TRANSITION RETREAT AGENDA

Adapt this outline to best suit the needs of your organization.

OUTGOING AND INCOMING OFFICERS PRESENT

I. Icebreaker / teambuilding activity.

II. Overview of the agenda and group discussion of the goals of the workshop.

III. History of the club: From past to present.

IV. Review short and long term goals, and progression toward them.

V. Review of financial status and accounting history of the club.

VI. External review: Overview of past year's programs, events and activities (Officer Evaluation activity suggested).

- Successes
- Areas for improvement
- Advice for the future

VII. Internal review: Overview of internal club affairs (Officer Evaluation activity suggested).

- Successes with membership participation/development
- Areas of difficulty/Areas for improvement
- Advice for the future

OUTGOING OFFICERS LEAVE. INCOMING OFFICERS AND ADVISOR CONTINUE.

VII. Discussion over the role of the advisor in the club (Role of the Advisor activity suggested). Set expectations for interactions with advisor.

VIII. Discuss goals of the club for the coming year. Be sure to review long term goals established by past administrations.

IX. Discuss ideas for internal club development.

X. Discuss ideas for external club programs (i.e. events and activities).

XI. Discuss budget for following year (pending SAF allocation, if applicable).

XII. Establish dates for follow through.

XIII. Discuss possible appointments of committee leadership and/or open positions.