



## OFFICER TRANSITION GUIDE

The purpose of this guide is to provide an outline of how outgoing officers can support incoming officers and chairmen and make sure they are most prepared for their upcoming term. This may be a process over a couple of weeks after officers have been elected or may be organized into a transition retreat. Either way, it will require some planning and forethought, as well as engagement from the outgoing and incoming leadership teams. Your Chapter Adviser and Alumni Advisory Board (AAB) can be a great resource in helping organize the process, as well.

### ROLE OF THE OUTGOING TEAM:

- Organize all pertinent resources and materials that you plan to hand off
- Wrap up any outstanding projects
- Inform important contacts, supporters, stakeholders that you will be leaving the position, and forward the new officer's contact information
- Identify all the things you wish you knew when starting your position, or the important things you learned in your role, and pass them on to the incoming officer
- Set aside time to connect with the new officer and provide important information, responsibilities of the role, key support resources, and any relevant documents
- Establish the best way for the new officer to contact you in the future for follow up questions

### ROLE OF THE INCOMING TEAM:

- Connect with the outgoing officer, including exchanging contact information
- Determine what you need to learn, identify all the things you would need from the outgoing officer to be successful in your new role
- Ask other people about what you may need to know or get from the outgoing officer, i.e. advisers, Chapter Consultant, other officers
- Set up times to meet with the outgoing officer and other key stakeholders and make sure it's enough time to have a thorough conversation (at least an hour)
- Establish the best way for you to contact the outgoing officer in the future for follow up questions

### ROLE OF THE CHAPTER ADVISER/AAB MEMBER:

- Provide guidance through the process
- Remind both the outgoing and incoming teams of their responsibilities during the transition process
- Help fill in any gaps or provide resources that outgoing officers cannot or do not have access to



### OFFICER NOTEBOOKS/FILES:

Each officer should maintain a notebook, binder, and/or online files with all the important resources and documents. This should be used to help each current officer keep everything organized and make it easy to hand off important materials to their successor. Today, a lot of officers use both physical notebooks or binders, as well as a digital folder (like Google Drive or Dropbox) to maintain online resources. Below is a general outline of important documents and resources that should be included in an officer notebook/binder/online file. Whether it is a physical item, a digital folder, or a combination of both, these materials are crucial to the success of an incoming officer.

#### Governance:

- Constitution, Bylaws, and policies of the local chapter and Phi Sigma Kappa Fraternity
- Officer position description
- Campus rules and policies

#### Key contacts:

- Contact information for all important advisers, fraternity/sorority office staff, International Headquarters professional staff, and other stakeholders pertinent to the officer position

#### Resources:

- Campus and local community resources
- Officer Portal support resources
- Additional Phi Sigma Kappa resources
- Any other helpful resources

#### Calendar and records:

- Calendar of the past year's events
- Sample calendar for the upcoming year
- List of important campus and Fraternity events

#### Projects/assignments:

- Information on any projects, assignments, or events the previous officer worked on during his term. This should include organized notes, calendars, schedules, outcomes and assessments of the events, projects or assignments that will be helpful for the next person.

### OUTCOMES

An intentional transition process should make the incoming leadership team feel as prepared for their new roles as possible. While a new officer can never be 100% prepared for every aspect of their role, taking the time to make sure they are starting off on the right foot is the expectation of all outgoing officers, and supports the long-term success of the chapter.



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|--|--|---|
| <p style="text-align: center;"><b>President</b></p> <ul style="list-style-type: none"> <li>• Gavel</li> <li>• Ritual Book</li> <li>• Campus FSL, IFC, and other important staff contact information</li> <li>• Alumni/Alumni club contact information</li> </ul> | <p style="text-align: center;"><b>Vice President</b></p> <ul style="list-style-type: none"> <li>• Chairman transition facilitation information</li> <li>• Recruitment information</li> <li>• ChapterBuilder login</li> </ul>                                   | <p style="text-align: center;"><b>Secretary</b></p> <ul style="list-style-type: none"> <li>• Meeting minutes template</li> <li>• Social media logins</li> <li>• Officer Portal User Guide</li> </ul>  |
| <p style="text-align: center;"><b>Treasurer</b></p> <ul style="list-style-type: none"> <li>• Bank account information and logins</li> <li>• Previous budget</li> <li>• Credit/debit cards</li> <li>• Check book</li> <li>• OmegaFi login</li> </ul>              | <p style="text-align: center;"><b>Sentinel</b></p> <ul style="list-style-type: none"> <li>• <b>ALL</b> ritual equipment</li> <li>• Notes on major risk management issues</li> <li>• Risk management and prevention resources or contact information</li> </ul> | <p style="text-align: center;"><b>Inductor</b></p> <ul style="list-style-type: none"> <li>• <i>Brotherhood in Phi Sigma Kappa Inductor's Guide</i></li> <li>• Previous lesson plans</li> <li>• Contact information for guest speakers</li> <li>• Officer Portal User Guide</li> </ul> |

### TRANSITION RETREAT:

In addition to individual officer transitions, it is important for the outgoing leadership team to transition to the new leadership team as a group. An effective way to facilitate this team transition is through an Officer Transition Retreat. While a retreat may serve as the main keystone of the leadership transition, it shouldn't serve as the only opportunity for the outgoing and incoming officers to connect and go over things. It is encouraged that individual incoming officers connect with their outgoing counterpart at least once before a retreat, as it can help make the retreat flow better and produce better outcomes.

### Retreat Best Practices:

- Location: Find a space out of the house (if your chapter has one), or a space on campus, or somewhere off campus, to help reduce the potential for distractions.
- Who's involved: Generally, you'll want to make sure as many of the outgoing and incoming officers are able to come. Other important people to have join the retreat, either for the whole time or a part of the time, include the Chapter Adviser, Alumni Advisory Board members, fraternity/sorority advisor, or other chapter stakeholders, IFC representative, or an International Headquarters professional staff member, if available.
- Establish goals for the retreat: Make sure everyone knows what the intention and ultimate goal(s) of the retreat are, so they can be best prepared. This will also help frame the agenda of the retreat.
- Make an agenda: Schedule the retreat however you like, but make sure there is an agenda already prepared and distributed to attendees before the actual retreat. This will help make sure everyone comes prepared and keep the group on track throughout the retreat. A sample agenda has been provided below.



**SAMPLE RETREAT SCHEDULE:**

| Time        | Event                              | Description   |
|-------------|------------------------------------|---|
| 10:00-12:00 | Previous Executive Board Review    | This time is for the previous Executive Board/chairmen to discuss some of their success stories accompanied by their areas for improvement.   |
| 12:00-1:00  | Lunch                              | Lunch should be held in the meeting room to retain the focus of all members. Ordering delivery or utilizing campus catering can make this easier.   |
| 1:00-2:00   | 1 on 1 Meetings                    | An opportunity for the outgoing and incoming officer/chairman to share individual knowledge and advice. This time is also when the previous Executive Board Member should hand off any physical items that belong to the new Executive Board member.                        |
| 2:00-3:00   | SMART Goal Setting                 | With the advice of the previous Executive Board, chairmen, and the Chapter Adviser, the group will construct goals which follow the SMART goal system.  |
| 3:00        | Previous Executive Board Dismissed | The outgoing officers are now allowed to leave.   |
| 3:00-4:00   | Budget Planning                    | This time is for the incoming officers to construct their budget for the upcoming year.   |
| 4:00-5:00   | Calendar Planning                  | This time is for scheduling events for the term, including chapter meetings, philanthropy, social, service, recruitment, associate member events, etc.  |
| 5:00-6:00   | Action Planning                    | Action planning is going to consist of reviewing the SMART goals that were made earlier and constructing plans as to how the chapter can efficiently achieve their goals. The time allowed for this activity is flexible and may be shortened if other activities run long. |
| 6:00        | Conclusion and Dinner              | Upon conclusion of the prescribed business above, the officers are urged to go out to dinner to bond as a new leadership team.  |