Officer Transition Summit
Overview
Time: 4.5 hours

An important and often overlooked process in Alpha Kappa Psi chapters is transferring of knowledge. Each academic year or term new officers, members and leadership are present in the chapter. To allow the chapter to continuously move forward in the right direction the transferring of knowledge must take place. Information about positions, goals, accomplishments and setbacks, events, awards, operations and traditions must be passed down from one person to the next to prevent the incoming members from having to “re-create the wheel.” Ideally, a person planning to run for a specific position should meet with the current officer before the election to gain a full understanding of the position and what it entails. The Officer Transition Summit is built out to ensure that the outgoing officer transfers the proper knowledge, operational procedures, accomplishments and setbacks, work in progress, goals for the future, and all necessary documents to the incoming officer ensuring that the chapter continues to move forward in the right direction. Depending on your election cycle, this can be completed directly before the Executive Workshop.

Objectives
• Evaluate team dynamics among new and old officers
• Discuss how team dynamics affects working as an executive board
• Summarize the progress of the current Chapter Success Plan
• Review the Fraternity’s Governing Documents
• Review the Calendar of Due Dates
• Transfer individual officer knowledge, items and resources

People in Attendance
• Chapter Advisor (if able)
• Current Chapter Officers
• Officer-elects

Key Skills
• Confidence
• Listening and Comprehension
• Oral Communication
• Organization
• Relationship Building
Materials Needed

- Team Style Handout (one per officer)
- Chapter Bylaws
- Fraternity Governing Documents
- Current Chapter Success Plan
- University policies and calendar
- Fraternity Calendar of Due Dates
- Officer Transition Worksheets
- Officer Transition Checklists

Transition Checklists

To fully transition roles, each outgoing officer should provide the officer-elect with the following items/information listed for each position. For ease of compilation and transition, consider housing everything in a binder, Google Drive, or flash drive. Also, consider including a letter detailing your experience; successes, failures, hopes for the position moving forward, and general advice to the incoming officer. These materials can either be brought and transferred at the Officer Transition Summit or during a 1:1 Transition meeting between current and elect officers.

Preparation

- The President should lead the event, while still participating in activities and discussions where applicable.
- Be sure to build in short breaks and meals to the schedule as needed, especially if combined with the Executive Retreat.
- Outgoing Officers
  - Complete ‘Outgoing Officer Evaluation’
  - Compile and provide all items listed in position checklist to officer elect
  - Complete ‘End of Term Report’
- Incoming Officers
  - Review position description
  - View all digital education for your position
  - Complete ‘Incoming Officer Handout’
  - Create a list of questions for the outgoing officer
  - Create a list of ideas for the position
President Transition Checklist:

☐ Copy of all governing documents
  ☐ Constitution
  ☐ Board of Director’s Statement of Policy
  ☐ Chapter bylaws
  ☐ University organization guidelines

☐ Contact information for
  ☐ Chapter Educational Resource Coordinator
  ☐ Regional Director
  ☐ Chapter Advisor
  ☐ Faculty Advisor
  ☐ Any supplemental university contact(s)
    ☐ Room booking
    ☐ Audio/Visual
    ☐ Food sales

☐ Officer curriculum roadmap
☐ Any e-mail or account logins necessary for the role
☐ List of important dates or weekly/monthly tasks
☐ Information related to committee(s) that you may oversee
☐ Gavel
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Officer Transition Summit

Vice President of Administration Transition Checklist:

- Copy of all governing documents
  - Constitution
  - Board of Director’s Statement of Policy
  - Chapter bylaws
  - University organization guidelines
- Contact information for
  - Chapter Educational Resource Coordinator
  - Regional Director
  - Chapter Advisor
  - Faculty Advisor
  - Any supplemental university contact(s)
    - Room booking
    - Audio/Visual
    - Food sales
- Officer curriculum roadmap
- Any e-mail or account logins necessary for the role
- List of important dates or weekly/monthly tasks
- Information related to committee(s) that you may oversee
- Previous fundraising strategies for PBLI and Convention
- Organization renewal and officer transition paperwork
- Committee Goal Summary from the previous year
- Ensure Fraternity events are listed on calendar build-out (or pending if hard dates are not yet available)
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Treasurer Transition Checklist:

- Copy of all governing documents
  - Constitution
  - Board of Director’s Statement of Policy
  - Chapter bylaws
  - University organization guidelines
- Contact information for
  - Chapter Educational Resource Coordinator
  - Regional Director
  - Chapter Advisor
  - Faculty Advisor
  - Any supplemental university contact(s)
    - Room booking
    - Audio/Visual
    - Food sales
- Officer curriculum roadmap
- Any e-mail or account logins necessary for the role
- List of important dates or weekly/monthly tasks
- Information related to committee(s) that you may oversee
- Current and previous budget(s)
- Bank account information and statements
- All bank account cards/checkbooks/ledger(s)
- List of outstanding debits and credits
- University grant application
  - Timeline of process/important dates
  - Pertinent information on the process
  - Sample application/copy of previous application(s)
- Federal Tax ID # and sample W-9
- Current corporate sponsorship contracts
- Fraternity Educational Savings Account information (if applicable)
- Information regarding chapter reimbursement procedures

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Vice President of Membership Transition Checklist:

- Copy of all governing documents
  - Constitution
  - Board of Director’s Statement of Policy
  - Chapter bylaws
  - University organization guidelines
- Contact information for
  - Chapter Educational Resource Coordinator
  - Regional Director
  - Chapter Advisor
  - Faculty Advisor
  - Any supplemental university contact(s)
    - Room booking
    - Audio/Visual
    - Food sales
- Officer curriculum roadmap
- Any e-mail or account logins necessary for the role
- List of important dates or weekly/monthly tasks
- Information related to committee(s) that you may oversee
- Process for reporting pledges and initiates
- Previous recruitment strategies and any supplemental documents/information
- Previous pledge program supplemental documents/information

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Master of Rituals Transition Checklist:

- Copy of all governing documents
  - Constitution
  - Board of Director’s Statement of Policy
  - Chapter bylaws
  - University organization guidelines
- Contact information for
  - Chapter Educational Resource Coordinator
  - Regional Director
  - Chapter Advisor
  - Faculty Advisor
  - Any supplemental university contact(s)
    - Room booking
    - Audio/Visual
    - Food sales
- Officer curriculum roadmap
- Any e-mail or account logins necessary for the role
- List of important dates or weekly/monthly tasks
- Information related to committee(s) that you may oversee
- Ritual trunk containing ritual books, robes, objects, etc.
- Tally of pledge pins and membership pins on hand
Vice President of Alumni Relations Transition Checklist:

- Copy of all governing documents
  - Constitution
  - Board of Director’s Statement of Policy
  - Chapter bylaws
  - University organization guidelines
- Contact information for
  - Chapter Educational Resource Coordinator
  - Regional Director
  - Chapter Advisor
  - Faculty Advisor
  - Any supplemental university contact(s)
    - Room booking
    - Audio/Visual
    - Food sales
- Officer curriculum roadmap
- Any e-mail or account logins necessary for the role
- List of important dates or weekly/monthly tasks
- Information related to committee(s) that you may oversee
- Contact information for alumni officers in the nearest alumni chapter(s)
- Contact list of all alumni associated with your chapter
- Copy of last year’s alumni communication strategy

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Secretary Transition Checklist:

- Copy of all governing documents
  - Constitution
  - Board of Director’s Statement of Policy
  - Chapter bylaws
  - University organization guidelines
- Contact information for
  - Chapter Educational Resource Coordinator
  - Regional Director
  - Chapter Advisor
  - Faculty Advisor
  - Any supplemental university contact(s)
    - Room booking
    - Audio/Visual
    - Food sales
- Officer curriculum roadmap
- Any e-mail or account logins necessary for the role
- List of important dates or weekly/monthly tasks
- Information related to committee(s) that you may oversee
- Definition of member statuses and the process on how and when to update them
- Current calendars
  - Academic
  - Chapter
  - Fraternity
- Access to create upcoming chapter calendar

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Welcome and Expectations (10 min)
Welcome everyone to the summit and review the schedule and objectives of the event.

Make sure to set ground rules (i.e. no cell phones) and expectations for the event (i.e. everyone joins in on the discussion). Be sure to involve participants in setting the expectations, as if they collectively agree and help set them, they will be more engaged in the program.

DiSC Activity (30 min)
Divide into the current and elect Executive Boards and spend about 10 minutes completing and discussing the Team Style handout in each respective group. For members who are part of both the current and elect boards, split evenly amongst the groups. Everyone should share where they feel they fit themselves, and members can share what they have witnessed about each other so far.

Discussion:
Does either group have a balanced team? A balanced team is where all four styles are represented in the group and are roughly equal in representation.

Which styles are more represented: Why do you think that is?
- To the current Executive Board –
  - How do you think this affected how well you worked as a team?
  - How did you compensate for any missing styles?
  - What did you appreciate most about working with this team?
- To the elect Executive Board –
  - How do you think this will affect your ability to work together?
  - How will you compensate for any missing styles?
  - What are you most excited about in terms of working with this team?
  - What are your expectations of other members on the team?

Document Review (45 min)
As a group, officers should review each of the Fraternity governing documents (Constitution, Board of Director’s Statement of Policy, and the standard Collegiate Bylaws) to get a base understanding of what rules are in place and start to build an understanding of how to operate within the fraternity’s policies. Officers should also review the chapter bylaws to ensure they are not in opposition to any of the governing documents, and there are no changes to be proposed to the chapter.
Chapter Review (45 min)

Each officer should be aware of the various calendars and events that must be accounted for during the upcoming academic year. Officers should review the Fraternity’s calendar of due dates and their university academic calendar. Officers should take note of dates that are relevant to their officer position. If you are not holding the Executive Workshop in conjunction with your transition, current officer should explain the progress of the Chapter Success Plan to date and discuss any action items or changes that need to occur to finish executing the current plan.

Questions to consider:

- What goals/projects are currently in process for the Chapter Success Plan? What steps must the new E-Board take to complete them?
- What general concerns or problems have come up over the past term/year? How were they handled?
- Are there any areas of concern for the upcoming term/year? Consider dynamics of the chapter, identify members who may be falling behind or may need extra support, and pinpoint members who have expressed an interest in leadership opportunities to further groom them for executive roles in the future.

Calendar Buildout (60 min)

Each officer should be aware of the various calendars and events that must be accounted for during the upcoming academic year. Work together using this knowledge to build out the chapter’s upcoming calendar. Taking into consideration your university academic calendar, Fraternity events (PBLI and Convention), Fraternity dues payment dates, and the university parameters for the pledging process. With this information you can determine the dates of each of your chapter meetings, pledge meetings, and rituals. From there you can build in additional brotherhood, alumni, professional and/or philanthropy events. If you don’t have concrete dates of when an event will take place, make a note of those tentative events and come back to them when planning has solidified.

One-on-One Officer Debriefs (60 min)

Utilize the Officer Transition worksheets to discuss the process for both ingoing and outgoing. The current out-going officer and the officer-elect should use this time to discuss all position specific knowledge one must have to fulfill the position to which they have been elected. Checklists for each of the core seven roles has been provided. Use these as a guideline Officers in attendance outside of the core seven should create a similar list for their role in addition to discussing all the required information.
Discussion

- For current officers
  - What concerns do you have about leaving office?
  - What did you not accomplish in your term that you wish you had been able?

- For elect officers
  - What hesitations do you have about being an Executive Board member?
  - What do you hope to accomplish in your term?

Wrap up and Expectations (10 min)

Have each member share their key takeaways from the transition and the next task they plan to work on. The following reminders are specific to spring transitions that are not held in conjunction with the Executive Workshop.

- Officers completing the Chapter Success Plan Reflection – Due May 15 (semester school), June 1 (quarter school)
- Officers completing the Chapter Success Plan – Due May 15
Using the chart above, determine which styles are represented in your Executive Board and discuss your preferred styles. Is your team weighted heavily in one area or another? What might be missing from your team? How might this affect how your team functions?
Officer Transition Worksheet

Outgoing Chapter Officers
Outgoing officers are integral to a successful officer transition. Each outgoing officer should take
time to prepare their materials to maximize the effectiveness and efficiency of the time spent with
the incoming officer.

Outgoing Officer Evaluation

As an executive board, have we developed our members in a way that is consistent with the vision
of the fraternity? Describe the efforts of the executive council.

Which of the programs we provided were our most successful? What contributed to that success?

What was our greatest achievement as an executive council?

Do we have any goals left unaccomplished? If so, why? What prevented us from achieving our
goal?
End of Term Report
This report will provide the incoming officer a more intimate look at the position. It also provides you as the outgoing officer the opportunity to provide suggestions to improve the position within the chapter.

**Projects and Goals:** List your projects and goals for your term in office. Did you accomplish the goal? Who else worked with you on each project or goal? What made the project or goal successful?

**Concerns:** Did you encounter any problems or disappointments during your term of office? Provide ways of avoiding or correcting them.

**Supplemental materials:** What other information should be passed along to your successor? Include campus contacts, ongoing contracts, community resources, etc.

**Timeline:** Provide your weekly or monthly calendar. How can this calendar be improved for efficiency and effectiveness?
Other: How else can your successor carry out the responsibilities of this office?

Document Sharing
Be sure to pass on a binder or online repository (such as HQdocs, Dropbox or Google Drive) containing all the documents used throughout your term of office. At minimum it should include the items listed in your position checklist. This will ensure knowledge or resources that will be helpful to the next officer is not lost over time.

Additional items you may want to consider including are:

- Vision and core values of AKPsi
- Job descriptions of officers
- Description of committees
- Organization membership list
- Historical records of organization
- Meeting minutes and agendas
- Listing of basic annual procedures (registration process, room reservations, etc.)
- Calendar of past year with annual events
- Financial records
- Resource or contact list of important people
- Recommendations for the upcoming year
Incoming Chapter Officers

Incoming officers are integral to a successful officer transition. Each incoming officer should take time to prepare their materials to maximize the effectiveness and efficiency of the time spent with the outgoing officer.

As incoming officers, you should seriously consider your desire to assist the members of the chapter. Remember, Alpha Kappa Psi’s vision is to be recognized as the premiere developer of principled business leaders. How will you support this vision? How does your position support this vision?

Preparing for the Transition Meeting

As a new officer, you should spend time considering your actions throughout your term in office. Be sure to review the available resources to be knowledgeable about your position prior to your transition meeting. Remember, everything the outgoing officer is going to share with you is new information. Be prepared to take notes!

Incoming Officer Handout

This will provide you with a roadmap for your term in office. Be sure to spend some time thinking about each level of your position. Your responses to these questions also provide you the opportunity to enhance and build upon the accomplishments of your predecessor.

What is the purpose of my office?

What are my responsibilities?
Using the ideas you listed above, create your goals for the position. Be sure to utilize the **SMART goal** method.

(Fill this in during your 1:1 transition) Does the outgoing officer have any thoughts or suggestions to improve your goal?

What are the first five things I should accomplish? How will I accomplish them?

Complete this sentence: At the end of my term in office, I want to be sure members...