



PHI SIGMA PI  
NATIONAL HONOR FRATERNITY



# Officer Training Manual: Officer Transitions





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## WELCOME

Transition is vital to the Chapter's future. With well-done transitions, incoming Officers will feel more confident and be able to make more ground within their term. Ideally, your Officers and Chairs should allow at least four weeks of shadowing and one-on-one training/transition before fully switching roles.

This manual is designed to give all Officers and Chairs the tools to successfully transition outgoing and incoming Officers and Chairs. Use the forms in this guide to walk you through the transition process. This packet is meant to empower new Officers/Chairs in your positions and guide you through intentional conversations.

This Officer & Chair Transition Guide is designed to be used in sections:

- Outgoing Officer/Chair Transition
- Incoming Officer/Chair Transition

## OFFICER INSTALLATION CEREMONY

The Officer Installation Ceremony is to occur once a year, after the election of new Officers. Ideally, this ceremony is most effective when performed at a Founders Day banquet, a formal or a special meeting. After the ceremony, the newly elected individuals become the official Chapter Officers.

You can find the ceremony starting on page 32 of your *Ceremonies and Ritual book*. If you need a copy, you can order one at [phisigmapi.org/merchandise](https://phisigmapi.org/merchandise).

## OUTGOING OFFICER/CHAIR GUIDE TO DO LIST

As the outgoing Officer/Chair it is your responsibility to gather all of your notes and contacts throughout the last year to pass onto the incoming Officer/Chair. Here are suggestions of items to ensure are completed before your successor takes office.

### **Reach Out to Members**

Reach out to Members that would excel in your role. Tell them in person, write it in a letter or leave a postcard letting them know you see their effort and dedication and that they have the skills for this position. This should be done throughout your entire term.

### **Review position Chapter Bylaws to National Constitution**

If your position is listed in the National Constitution, compare tasks in your Chapter Bylaws to those in the National Constitution. It is important to note that your Chapter's Bylaws should not contradict the National Constitution, as stated in Article III: Organization, Section 1.

### **Shadow**

Allow Members who are interested in your position to shadow you throughout the term. Let these Members come to Executive Board Meetings, listen to how you come up with your report during Chapter Meetings and sit on Committee Meetings to see how they are run. Allowing Members to shadow you will let them see what is involved in the position before running for it. This will also show Members in your Chapter who is interested in running for the position to be nominated.

### **Update Resources/Binders/Google Drive**

Update resources in your binders/Google Drive/etc with tips and tricks that worked this past year, event evaluations and event ideas. See page 6 for a list of transition documents.

### **Make sure all contacts, bills and invoices have been accounted for.**

If any are in process at the time of transition, write a memo to the new Officer noting what is complete/what needs to be done with them.

**Develop an action plan and timeline of your position, including by not limited to:**

- Necessary meetings attended and conducted by Officer
- Important tasks
- Sharing tasks and duties with other positions
- Introductions to key people/relationship building
- One on one meetings and trainings
- Financial information
- Leadership training
- University and National due dates
- University black out dates for planning events

**Meet With Nominees**

Once nominations take place, you should meet with each of the nominees. Describe the position in more detail and answer any questions. This meeting will allow you to share the ins and outs of the position.

**Complete Outgoing Officer/Chair Information Sheet(s)** *(see page 8)*

**Meet with Successor**

Once your successor has been elected, start the full transition plan, including:

- Weekly one on one meetings for at least four weeks
- Shared Executive Board/Chapter Meeting Reports for at least four weeks
- Introduce to university/National Staff contacts
- Generating ideas and planning events for the next term

**New Term Meeting**

If possible, schedule a meeting three to four weeks into the next term if the predecessor will be around campus or local. This will be enough time for the newly-elected/appointed Officer/Chair to gather additional questions that need answers.

## TRANSITION DOCUMENTS

**University Mission Statement/Phi Sigma Pi Mission Statement-**

Having both mission statements handy will be a constant reminder of how our events and operations should be planned as an organization on campus.

**Officer/Chair Training Manual-** Many positions have Training Manuals with all of the information inside. These handbooks are available in the Resource Center of the National Website. Each handbook highlights and describes the specific duties of the Officer/Chair positions as stated in the National Constitution and the Phi Sigma Pi National Operating Policy.

**List of Responsibilities-** This list should go beyond what is outlined in the National Constitution and Chapter Bylaws.

**Chapter Standards of Excellence Manual-** The Chapter Standards of Excellence (CSE) offers an online evaluation resource to empower Chapters to annually meet the highest standards of Chapter governance, management and mission-driven operations. It has been developed to provide transparency for what it means to achieve excellence and be eligible for awards such as the Joseph Torchia Outstanding Chapter Award, which is the highest designation a Chapter can achieve annually.

**List of Ongoing Activities-** Your Committee should brainstorm to add to this list at least once a term.

**Contact Information-** This list should include all people, departments, offices, businesses, organizations, etc. related to the position.

**Goals-** This should include information about what past Officers/Committees were working toward and what has been accomplished as a result. This should also include anything discussed with your Chapter Consultant.

**Budget Information-** List past research on how much materials cost from which websites/businesses and how much your position has budgeted in the past/currently.

**Chapter Calendar-** It's important for your Chapter to collectively make a calendar at the end of each term for the next term.

**Event Planning & Evaluation Sheets-** An example of this can be found in the Resource Center on the National Website. It is suggested

that you hold on to all planning and evaluation sheets for one full year following the term that they were written.

**Old Files-** If your position has any files that are used term after term get them from the outgoing Officer/Chair.

**Social Media usernames and passwords**

**Frequently Asked Questions-** Officers should write their FAQ sheets individually. Chairs should work with the entire Committee to write one. Brainstorm any and all questions you asked yourself during the term.

**Governing Documents-** These files help Officers/Chairs to understand their position as well as to clarify why certain events and activities are organized in a way that they are. These documents should include: Phi Sigma Pi National Constitution, Phi Sigma Pi National Operating Policy, Chapter Bylaws, Chapter Operating Policy and Chapter Risk Management.

**Letter-** This should be a personal letter from you to the future Officer/Chair. This letter is meant to wish your successor luck and welcome them to contact you with questions. Be sure to add your contact information.

## Outgoing Officer Worksheet

To be completed by the outgoing Officer before transition meetings and training sessions. An additional copy of this worksheet is on page 21 of the guide.

Position:

Name:

Email Address:

Phone Number:

Please think through and respond to the following questions regarding your responsibilities; this information will be helpful to your successor.

The responsibilities of my position included:

Other Officers with whom you worked and the projects involved:

List what you enjoyed most and least regarding your position:

Who was the most helpful in getting things done? Who were good resources? List other aids that helped complete your job:

Things you wish you had known before you took the position include:

List specific accomplishments realized during your term in office and the reasons for their success. What did you try that worked well and would suggest doing again? Why?

List any problems or disappointments you encountered as a part of your position and suggest ways of avoiding or correcting them. What did you try that did not work? Why did it not work? What problems or areas will require attention within the next year?

What could you have done to make this a better experience?

What was the most difficult decision you had to make?

List supplemental materials and sources of information you found most helpful. Include specific alumni or faculty contacts, university / college officers, community resources, etc.

Create a timetable/list important dates related to your position. Provide suggestions for increasing efficiency and effectiveness.

What should be done immediately during break? In the new term?

List any other suggestions you feel would be helpful to your successor in carrying out the responsibilities of this office.

## Outgoing Officer Major Accomplishments

Complete the Outgoing Officer Major Accomplishments chart on page 24 of the guide, see sample below. This should be completed by the outgoing Officer before transition meetings and training sessions.

Accomplishments	Barriers/ Limitations	Resources	Solutions	Still to be Done

## Outgoing Executive Board Evaluation

This document is to be used by the outgoing Executive Board at a final Executive Board Meeting to assess the entire group's process throughout the year. An additional copy of this worksheet is on page 25 of the guide.

Have we developed younger members who will prove to be exceptional and involved?

What programs or governing practices proved successful for us?

What was our greatest achievement as an executive board?

What was our greatest challenge as an executive board?

Three goals we would have liked to accomplish:

Three goals we would like our successors to achieve/build on:

## Event Evaluation

Complete the event evaluation worksheet after every event that your Chapter holds. Share the previous event evaluations with incoming Officers during transitions. A copy of the event evaluation worksheet is on page 27 of the guide, see sample below.

Event Name:  
 Date:  
 Time:  
 Location:  
 Planned by Committee:  
 Members:

Event Overview:

Event Goal:

### Attendance

Undergraduate Members:  
 Initiates:  
 Alumni:  
 ICR Members:  
 Non-Members:

Budget:

Item	Cost
<b>Total</b>	

Budgeted: \$                      Spent: \$

Marketing/Promotions:

Key Contacts:

How Successful was the event?

Which Committees or groups collaborated on this event?

How was this event advertised?

## Officer/Chair Transition Meeting Outline

Before the newly elected Officer/Chair officially assumes responsibilities, it is wise for the you and the new Officer/Chair to get together for a transition meeting. Such a transition meeting provides continuity and continued growth for the organization while allowing the new Officers to learn from the experiences of the outgoing Officers. A casual, open atmosphere should be encouraged so the organization can benefit from an honest evaluation of the accomplishments and issues of the previous year. The following outline can help make the transition meeting flow as smoothly as possible.

- **Welcome and Introductions** (Help participants get acquainted and explain the purpose of the meeting)
- **The Year in Review**

Goals: Review the group's goals for the previous year.

- What did we hope to accomplish?
- How well did we do on each goal?
- What goals should be continued this year?
- What goals need to be changed?
- What goals are no longer feasible?

Programs and Activities: Evaluate what your group did.

- How effective were the programs / activities we sponsored?
- How did we measure their effectiveness?
- Did we have a good balance in our schedule of programs and activities?
- Were our programs and activities consistent with our goals?
- What activities and programs do we want to repeat?

Membership: Evaluate number of members and their commitment.

- What actions did we take to recruit Members?
- Were our recruitment efforts successful?
- Are our Members as actively involved as we want them to be?
- What were the opportunities for Members to get involved in a meaningful way?

Officers/Chairs and Organizational Structure: Evaluate Officers/chairs and structure.

- Are Officer roles and responsibilities clearly described? How?
- Did Officers work as a team, or is there more teamwork needed? If so, what contributed to that dynamic?
- Is the time and effort required in each position comparable?
- Is there two-way communication between Officers/Chairs and Members?
- How do the Members feel about the Officers/Chairs?

Organizational Operations: Evaluate finances, communication, etc.

- Were the finances adequate for our group and managed properly?
- Were meetings run effectively? Was their frequency adequate?
- Did the Committee structure work?
- Did we have scheduling conflicts with other groups or activities?

Advisor Involvement: Evaluate both quality and quantity.

- Did our Advisor provide the support we needed?
- Did we give our Advisors and other faculty a chance to get involved?
- How could we improve faculty and Advisor involvement?

Public Image: Evaluate how other groups perceive you.

- How do we see ourselves? Is this how "outsiders" see us?
- How can we enhance our image?

- **Your Legacy to the New Officer Team**

- What are the current strengths and weaknesses of the group?
- What is the best advice you can give your successor?
- What were there major challenges and accomplishments in your term?

- **Officer Transition**
  - Responsibilities of the position, with a job description
  - A timetable for completion of annual duties
  - Unfinished projects
  - Important contacts and resource persons
  - Mistakes that could have been avoided
  - Advice for the new Officer
  - Any questions the new Officer may have
  - Where the outgoing Officer can be reached with future questions
  
- **Wrap-Up**
  - Answer any outlying questions

# INCOMING OFFICER GUIDE

## Incoming Officer Guide Checklist

### Beginning of the Term to Elections:

**Research positions within the Chapter you are interested in**

What are the responsibilities listed in the National Constitution/Chapter Bylaws? What is the time commitment? Will it fit into your schedule for the upcoming year?

**Shadow**

Once you narrow down your selection, shadow the current Officer/Chair in the role. Attend Executive Board Meetings, sit near this person during Chapter meetings and listen specifically to their report, attend Committee Meetings to see how they are run. Shadowing Members will give you a closer look at the position.

**Get Nominated**

Once you are nominated for the position you would like to run for start creating a speech to give during elections.

**Meet with current Officer/Chair**

Ask more detailed questions about the ins and outs of the position.

### Once Elected (at least four weeks/Chapter Meetings left in term):

**Schedule one-on-one meetings with outgoing Officer/Chair**

Complete the worksheets on page 18 to get ready for this conversation. Complete one-on-one meetings weekly until the end of the term.

**Attend the rest of the Executive Board Meetings**

Listen in on Executive Board Meetings to get up to speed. Once you feel comfortable, work on the Executive Board Report with the outgoing Officer/Chair and by the end of the term (at least two meetings left) start to play a more active role in Executive Board Meetings and give reports.

**Set up and attend meetings with outgoing Officer/Chair and other Members/Faculty Advisors/Alumni Advisors/National Staff**

Have the outgoing Officer/Chair introduce you to other Members and outside roles that work closely with your position. Make sure to gather any contact information you are missing.

 **Run Chapter and Committee Meetings together**

Start to slowly switch over roles when it comes to running and giving reports at Chapter & Committee Meetings. With two weeks left you should completely be giving the reports and leading the meetings with the outgoing Officer/Chair by your side to step in and help.

 **Switch over signature authority (President/Treasurer mostly)**

If your role deals with banking or university signature requests switch them over from the outgoing Officer/Chair to the incoming Officer/Chair.

 **Complete the Officer Installation Ceremony in The Rituals & Ceremonies Book** **Jump Start Planning Events**

Start to plan events while the outgoing Officer/Chair is still around. This will allow you to jumpstart Chapter programming when you get back from winter/summer break.

**Following Term:** **Schedule a follow-up meeting**

If possible, schedule a meeting three to four weeks into the next term if the predecessor will be around campus or local. This will be enough time for you to gather additional questions that need answers.

## Incoming Officer Transition Worksheet

To be completed by the Incoming Officer before transition meetings and training sessions. An additional copy of this worksheet is on page 29 of the guide.

### Questions I want answered:

1. What are things specific to the position that I want to know about (forms, duties, etc.)?
2. What are things I should do over the summer/winter break?
3. Which positions will I work closely with?
4. What university/National Office services do I need to know about?
5. What do I need to know about working with our Faculty/Alumni Advisors?
6. What are some other questions I want answered?



### Incoming Officer "Goals, Dreams & Priorities"

Complete the Incoming Officers "Goals, Dreams & Priorities" chart on page 31 of the guide, see sample below.

Things I'd like to Accomplish	Barriers/ Limitations	Resources	Unknown Questions	Why We Want This

## Outgoing Officer Worksheet

Position:

Name:

Email Address:

Phone Number:

*Please think through and respond to the following questions regarding your responsibilities; this information will be helpful to your successor.*

The responsibilities of my position included:

Other Officers with whom you worked and the projects involved:

List what you enjoyed most and least regarding your position:

Who was the most helpful in getting things done? Who were good resources? List other aids that helped complete your job:

Things you wish you had known before you took the position include:

List specific accomplishments realized during your term in office and the reasons for their success. What did you try that worked well and would suggest doing again? Why?

List any problems or disappointments you encountered as a part of your position and suggest ways of avoiding or correcting them. What did you try that did not work? Why did it not work? What problems or areas will require attention within the next year?

What could you have done to make this a better experience?

What was the most difficult decision you had to make?

List supplemental materials and sources of information you found most helpful. Include specific alumni or faculty contacts, university / college officers, community resources, etc.

Create a timetable/list important dates related to your position. Provide suggestions for increasing efficiency and effectiveness.

What should be done immediately during break? In the new term?

List any other suggestions you feel would be helpful to your successor in carrying out the responsibilities of this office.

## Outgoing Officers Major Accomplishments

Accomplishments	Barriers/ Limitations	Resources	Solutions	Still to be Done

## Outgoing Executive Board Evaluation

*This document is to be used by the outgoing Executive Board at a final Executive Board Meeting to assess the entire group's process throughout the year.*

Have we developed younger members who will prove to be exceptional and involved?

What programs or governing practices proved successful for us?

What was our greatest achievement as an executive board?

What was our greatest challenge as an executive board?

Three goals we would have liked to accomplish:

1.

2.

3.

Three goals we would like our successors to achieve/build on:

1.

2.

3.

# Event Evaluation

Event Name:

Date:

Time:

Location:

Planned by Committee:

Members:

Event Overview:

Event Goal:

## Attendance

Undergraduate Members:

Initiates:

Alumni:

ICR Members:

Non-Members:

## Budget

Item	Cost
<b>Total</b>	

Budgeted: \$

Spent: \$

Marketing/Promotions:

Key Contacts:

How Successful was the event?

Not Successful      1      2      3      4      5      Very Successful

Which Committees or groups collaborated on this event?

How was this event advertised?

What went well?

What could be improved?

What should be changed to make this event more successful in the future?

Should we hold this event again?      Yes      No

Why or why not?

**Please provide a “to do” list for future planning**

Month	Action Item	Completion Date	Person Responsible

# Incoming Officer Transition Worksheet

## Questions I want answered:

1. What are things specific to the position that I want to know about (forms, duties, etc.)?
2. What are things I should do over the summer/winter break?
3. Which positions will I work closely with?
4. What university/National Office services do I need to know about?
5. What do I need to know about working with our Faculty/Alumni Advisors?
6. What are some other questions I want answered?

**Questions for Outgoing Officers:**

1. What do you perceive to be the positions objective or goal?
2. What do you consider to be the responsibilities of the position?
3. What were your expectations of yourself in this position?
4. What expectations did you have of the Executive Board?
5. What expectations do you believe Members had of you?
6. What problems or areas will require the most attention within my year of office?
7. What should be done immediately?
8. Who do you anticipate will be most helpful in getting things done (people outside of Phi Sigma Pi, Advisors, Professors, Administrative Staff, etc.)?

## Incoming Officer "Goals, Dreams & Priorities"

Things I'd like to Accomplish	Barriers/ Limitations	Resources	Unknown Questions	Why We Want This