

Consul – Officer Transition Meeting



Overview

Officer transition is the single most important event for a Sigma Chi chapter and allows for a quick and effective start to the annual organizational cycle. It is recommended that the transition period be marked by one of several formal "transition training" meetings.

The purpose of this resource is to give the incoming and outgoing chapter officers a format to be used to help ease the transition as the newly elected officers take over from the previous officers as well as a format to discuss the various aspects of chapter operations and how officers are interconnected and must work as a team to achieve the desired goals/objectives.

It is recommended that the transition meeting(s) be conducted before the new officers are installed and before the former officers leave campus. The meeting should include all officers, the chapter advisory board members and the Sigma Chi Regional Chapter Support staff member, either in person or virtually, if available.

A casual, open atmosphere should be encouraged so that the chapter can benefit from an honest evaluation of the group's accomplishments and problems of the previous year. Through this transition, the incoming officers will be able to learn from the experience of the previous officers and offer continuity and continued growth for the chapter.

Ideally, the chapter advisor will facilitate this session so that all officers can actively participate.

Most likely, adjustments to the recommended agenda outline will be necessary to meet the needs of your chapter.

Transition Meeting

Note: The meeting should be conducted in either the chapter house, a campus room or the office of an alumni that has A/V equipment so that the appropriate documents (i.e. agenda, strategic plan, budget, etc.) can be shared.

1) Welcome and Introductions

- a. Explain the purpose of the meeting

2) The Year in Review

- Review the chapter strategic plan/ goals for the previous year
 - What were goals/objectives?
 - Where they met or accomplished as set forth?
 - Why/Why Not?
 - Which goals should be further developed?
 - Which goals should be discarded

3) Activities and program evaluation (resource: the chapter calendar)

- What events, programs, activities did the chapter support?
- How effective was each program?
- Was there an appropriate mix of different kinds of programs?
- Did we do any community service activities?
- Were the programs and activities consistent with Sigma Chi values?
- Which activities should be continued, and which should not be continued.

4) Membership Evaluation

- How many members will graduate in the upcoming academic year?
- What is membership headcount goal?
- What percent of roster is truly involved/participate in chapter events?
 - o Including decision making, planning, implementing, and evaluating.
- Are members enthusiastic about the chapters' activities and motivated to work towards goals?
- Were opportunities for members to get involved in responsible and meaningful ways?

5) Officers and Organizational Structure Evaluation

- What do outgoing officers know now that they wished they had known when they took office?
- Do the officers understand their responsibilities and roles?
- Did the officers complete the appropriate online Officer Training Academy modules prior to or within 30 days of being elected?
- Do officers have a connection with the 'personality' of the chapter?
- How does the EC gain an understanding of chapter members' needs and wants?
- Is the amount of time and effort required of each officer equal, or are some expected to work How would the general membership evaluate the effectiveness of the officers?
- How will the officers evaluate themselves during the academic year (i.e. monthly, 1x semester, etc.)

6) Organizational Operation Evaluation

- Was the budget for the previous academic year sufficient to fund all chapter events and managed correctly?
- Are all members current with their financial obligation?
- Is there a financial obligation commitment form that each member must sign prior to start of next academic year that details their financial obligation (i.e. total dues, dues payment schedule, payment plan protocol, etc.)

- Is a budget for the upcoming academic year developed? (should be done before the end of the current semester)
- Time, and place of weekly ritual chapter meeting
- Time and place of weekly EC meeting (should be different day than weekly ritual chapter meeting)
- Does each EC member have a supporting committee? (see index: Chapter Management PPT)
- How engaged is chapter leadership with the Office of Fraternity & Sorority Life, chapter advisor/advisory board, house corporation leadership, Grand Praetor, Grand Tribune, Regional Chapter Support staff, faculty advisor, administration, etc.
- How do students, faculty, administration and community view our chapter?
- How can the chapter improve engagement with the above?

7) Chapter Document Evaluation

- **Strategic Plan**; must be completed and posted to the Sigma Chi Portal by 9/15 annually
- **Academic Year Budget**: must be completed by end of the transition semester, approved by EC and sent to members before first academic year chapter meeting
- **Risk Management Plan**; must be completed and presented to members at the first chapter meeting each semester; members must sign a form acknowledging their acceptance of and support for the plan; the plan and completed signature sheet need to be emailed to rmfstaff@rmfeducation.org by 9/15 annually
- **Chapter Budget** for the upcoming academic year must be complete by the end of the preceding semester
- **The Due's Structure** and payment schedule for the academic year; this needs to be communicated to members by 7/15 annually; a best practice for payment is to require 50% of semester dues payable on the first day of class and the balance due in 30 days; this provides funds needed for operation and will identify the members that need a payment plan sooner rather than later
- **Chapter Bylaws** must be reviewed by EC and any changes/updates noted and assigned to a bylaw development committee to draft appropriate language to be presented to chapter members. Bylaws, even if not updated to the satisfaction of the EC, must be uploaded to

Sigma Chi Portal by 9/15 annually. Updated bylaws can be uploaded to Sigma Chi Portal anytime during the academic year.

- **Community Service Hours/ Dollars Raised** must have a tracking protocol and be updated on Sigma Chi Portal when incurred