



Sigma Nu Fraternity

Supporting Chapter Officer Transition

Alumni Engagement Series

Today's Presenters

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Supporting Chapter Officer Transition





Overview

- **The challenge working with students during officer transitions from year-to-year forces Alumni volunteers and campus administrators to ensure yearly discussions about effective transitions and appropriate planning**
- **Collegiate officers need to understand the basics of leadership, working in teams, new methods of effective & efficient management, and mostly importantly the need for intentional strategic planning**
- **Sigma Nu has extensive resources and tools to help with these transitions including the LEAD Program and the Best Practices Library in addition to Sigma Nu Leadership Consultants , HQ Staff, AAB, and Division Commanders**



Planning for Successful Transition

Ensure the chapter plans and schedules their annual election process. A good place to start is to ensure the chapter plans and communicates their election process.

Chapters should schedule their elections by the end of Fall Semester, so officers have time to shadow current officers and engage in strategic planning and training prior to the end of the semester.

Planning for Successful Transition

Ensure the chapter plans for their participation in College of Chapters. College of Chapters occurs annually in early January during Winter Break.

Chapters can request to send two (2) delegates and should at minimum send their Commanders. Delegates will learn how to engage the chapter in strategic planning as well as establishing their own plan for their chapter.



Planning for Successful Transition



Develop a Strategic Planning Workshop for the chapter in November/December prior to College of Chapters.

To prepare for College of Chapters, the Commander should schedule a Strategic Planning Workshop for the chapter so they have a draft plan to take to Roanoke, VA.

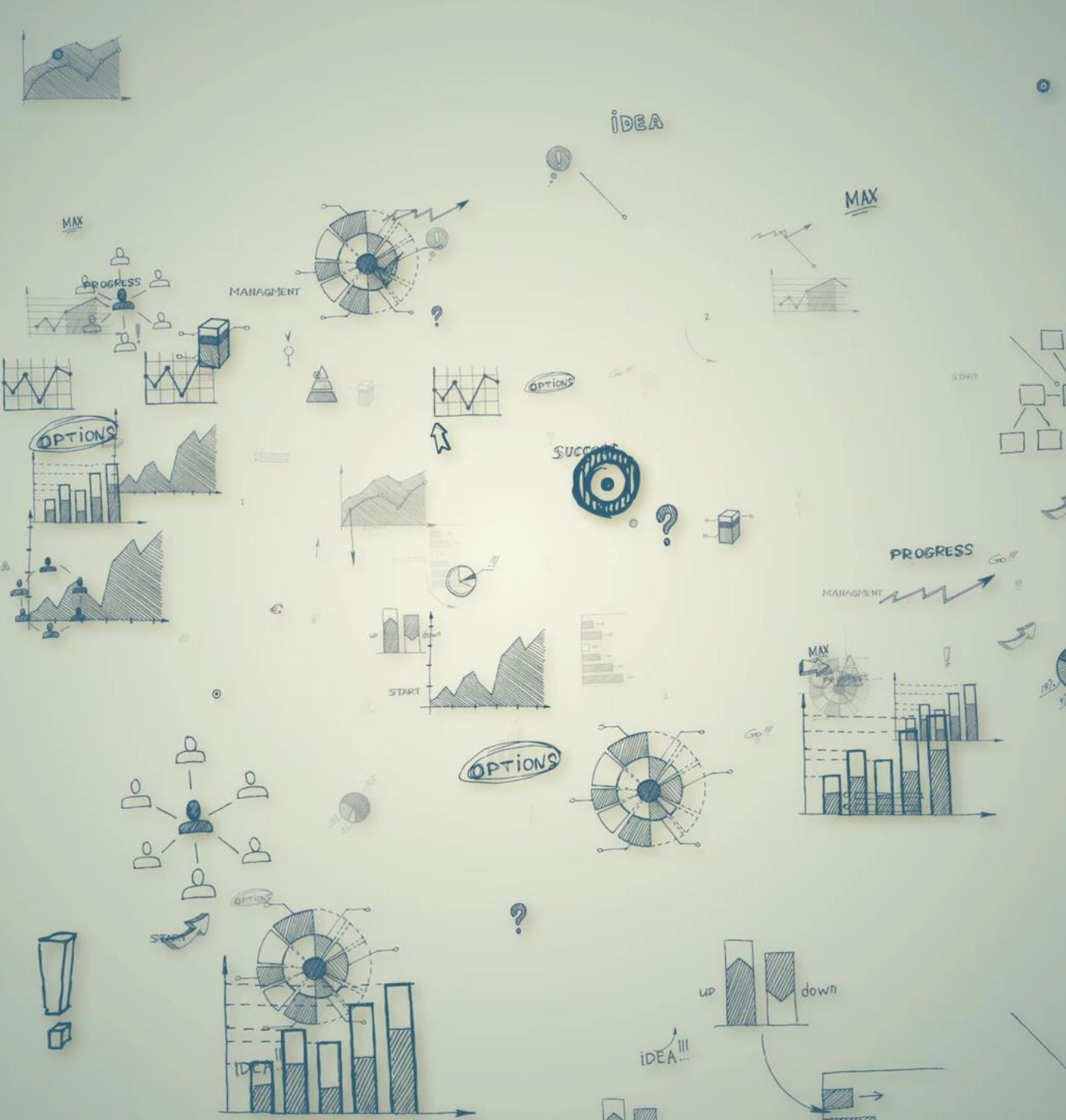
Remember: Proper Planning Prevents Poor Performance.

Planning for Successful Transition

Document as much as possible for the chapter to establish plans that can be used for future use.

The more a chapter plans and documents, the better things will be for future leaders.

Over time, this will become a valuable resource.



Planning for Successful Transition



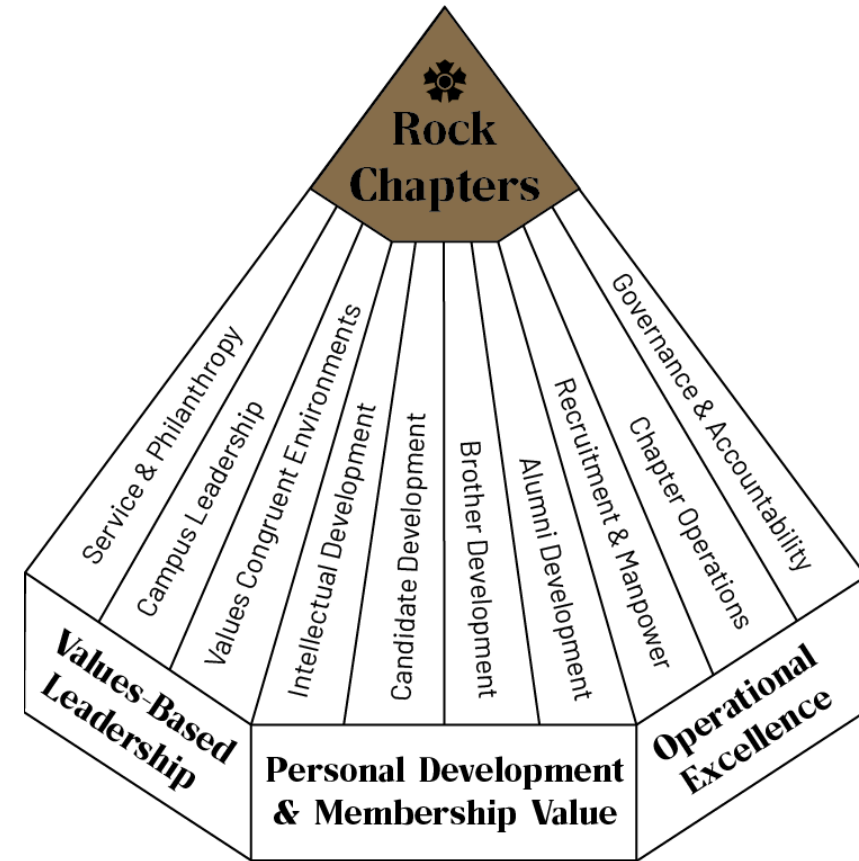
Utilize Sigma Nu's Resources.

Sigma Nu provides an extensive Resource Library to assist Brothers, Advisors and Alumni Leaders in supporting its chapters including The LEAD Program, Best Practices Library, Officer Manuals, and Leadership Consultants

Planning for Successful Transition

Pursuit of Excellence Submission in
March/April

August/September review results of
the Pursuit of Excellence Program for
areas of deficiency





Chapter Officer Transition

Implementation

LEAD Session for Officer Transition



ALL CHAPTER LEAD

MODULE B: CHAPTER DEVELOPMENT

SESSION 5: OFFICER TRANSITIONS

FACILITATOR GUIDANCE NOTES

Objectives:

- Review the success and challenges of the term/year
- Provide closure for outgoing officers
- Build teamwork and common focus for new officers ▪ Review and agree upon what is expected of new officers

Officer Transition Resources



Officer Transition Resources

Sigma Nu Fraternity provides numerous resources to assist collegiate chapters with elections and officer transitions. LEAD sessions, officer manuals, officer resource pages, checklists, and worksheets to support annual officer turnover and chapter goal setting are below.

LEAD Sessions

The [Officer Transitions](#) session is a guide for an officer retreat or multi-session meeting to transition individual roles and conduct a collective handoff between outgoing and incoming officers.

Related LEAD sessions relevant for new officer groups and the start of an academic term:

- [Strategic Planning](#)
- [Goal Setting](#)
- [Delegation](#)
- [Effective Meetings](#)
- [Pursuit of Excellence Strategy Session](#)
- [Visionary Leadership](#)

General Officer Resources

The Fraternity maintains resource hubs for key officer positions. These [Officer Resource pages](#) include each officer's manual, key policies, and relevant resources for their role.

- [Officer Resource pages](#)
 - www.sigmanu.org/commander
 - www.sigmanu.org/lccommander
 - www.sigmanu.org/treasurer
 - www.sigmanu.org/recorder
 - www.sigmanu.org/marshal

Officer Transition Resources

Events

[College of Chapters](#)

- January 3-6 in Roanoke, Va.
- Intense, interactive program for collegiate Commanders focusing on chapter management, leadership, and core competencies.
- Curriculum designed to provide participants with the knowledge and skills necessary to strengthen their chapter and develop a network of support and experience they can call upon during their tenure.

[Resources](#)

[Sigma Nu Institute](#)

- National, virtual programs held on Saturday afternoons in late January.
- Designed to assist with the officer transition process and learning curve that accompanies taking on new positions of chapter leadership.
- [Resources](#)



Officer Transition Resources

Incoming / Outgoing Officer Transition Prompts

- [Officer Transition Checklist](#)
- [Officer Binder Checklist](#)
- [New Officer Goal Setting](#)
- [New Executive Committee Goal Setting](#)

ADVICE FOR NEW OFFICERS

- [The Art of Delegating](#)
- [Ten Commandments of Leadership](#)
- [Habits of Successful Executive Committees](#)

Strategic Planning Resources

- [Strategic Planning and Action Plans Overview](#)
- [Chapter Strategic Plan Template](#)

Relevant officers are also encouraged to create / update the action plan for their area each term. Action Plan templates are available to support chapters in developing a comprehensive plan for achieving Excellence in the Pursuit of Excellence Program criteria. Each plan facilitates the establishment of officer and committee expectations, goals, and operational strategies.

ACTION PLAN TEMPLATES

- [Service and Philanthropy](#)
- [Campus Leadership](#)
- [Values Congruent Environments](#)
- [Intellectual Development](#)
- [Candidate Development](#)
- [Brother Development](#)
- [Alumni Development](#)
- [Recruitment and Manpower](#)

[Best Practices Library](#)

Ideas, templates, programs, and resources that result in or lead to excellence. Best Practices come from chapters of every size, institutional type, and region of the country. The [Best Practices Library](#) is organized into sections based on the Pursuit of Excellence Program, with practices organized into themes for each area.

- [Officer Transitions](#)
- [Virtual officer elections, transitions, and voting](#)

A companion [Alumni Best Practices Library](#) includes ideas and resources for Alumni Advisory Boards, House Corporations, and Alumni Engagement.

[General Fraternity Guidance](#) on conducting virtual elections and officer transitions, if/when necessary.

Important Due Dates for 2022-2023

Reporting and Application Deadlines

Risk Reduction Affidavit Due	September 15 and February 15
Members Area Membership and Officer Roster Update	Within First 15 Days of Start of Each Term
Candidate Membership Verification	Within 72 Hours of Candidate Ceremony
Initiate Membership Verification	Within 72 Hours of Initiation Ceremony
The Quarterly, Fall Issue Chapter News Submission Deadline	June 15
The Quarterly, Winter Issue Chapter News Submission Deadline	September 15
The Quarterly, Spring Issue Chapter News Submission Deadline	December 15
The Quarterly, Summer Issue Chapter News Submission Deadline	March 15
Fraternity Awards Packet Submissions Due	April 30
National Scholarship Applications Due	April 30
General Fraternity Employment Deadlines	October 15 (Early Decision) and March 1 (If Applicable)

CommunityEdu (formerly GreekLifeEdu)

Completion Deadline	May 1*
*90% of members must have completed Part I – either this year or in a previous year – with an exam grade of 80% or higher for chapters to qualify for the financial incentive.	

Financial Information

Review the Back to School Information (Fall term, Spring term) for additional details.

Fall Risk Management Assessment	Due by October 1 and November 1
Fall Conclave Fee	Due by September 15 and October 15
Spring Risk Management Assessment	Due by February 15 and March 15
Spring Conclave Fee	Due by March 1 and April 1
Initiate Dues	Due within 30 Days of Membership Roster Update Each Term
Candidate & Initiation Fees	Billed Upon Approval of Candidacy for Each Member
All Dues, Fees, and Assessments Due	Within 30 Days of Invoice Date*

Each chapter's IRS Form 990 must be filed by the 5th month after its accounting period ends.

*For PEP review purposes, outstanding debt as of April 30 may result in a deficiency in Chapter Operations.

Event Information

College of Chapters	January 3-6, 2023
70 th Grand Chapter	June 28-July 2, 2023
Sigma Nu Institute	January and February, 2023
Founders' Month of Service	April 2023
National Hazing Prevention Week	September 19-23, 2023
#SafeSpringBreak Campaign	Mid-February – March 2023

Pursuit of Excellence Program (PEP) Dates

All Chapter PEP Strategy Session	Within First 2 Weeks of the Start of the Fall Term
PEP Chapter Improvement Plans Due	September 30
All Chapter PEP Self-Assessment Session	Recommended between April 1 and 15
PEP Chapter Self-Assessment Submission Due	April 30

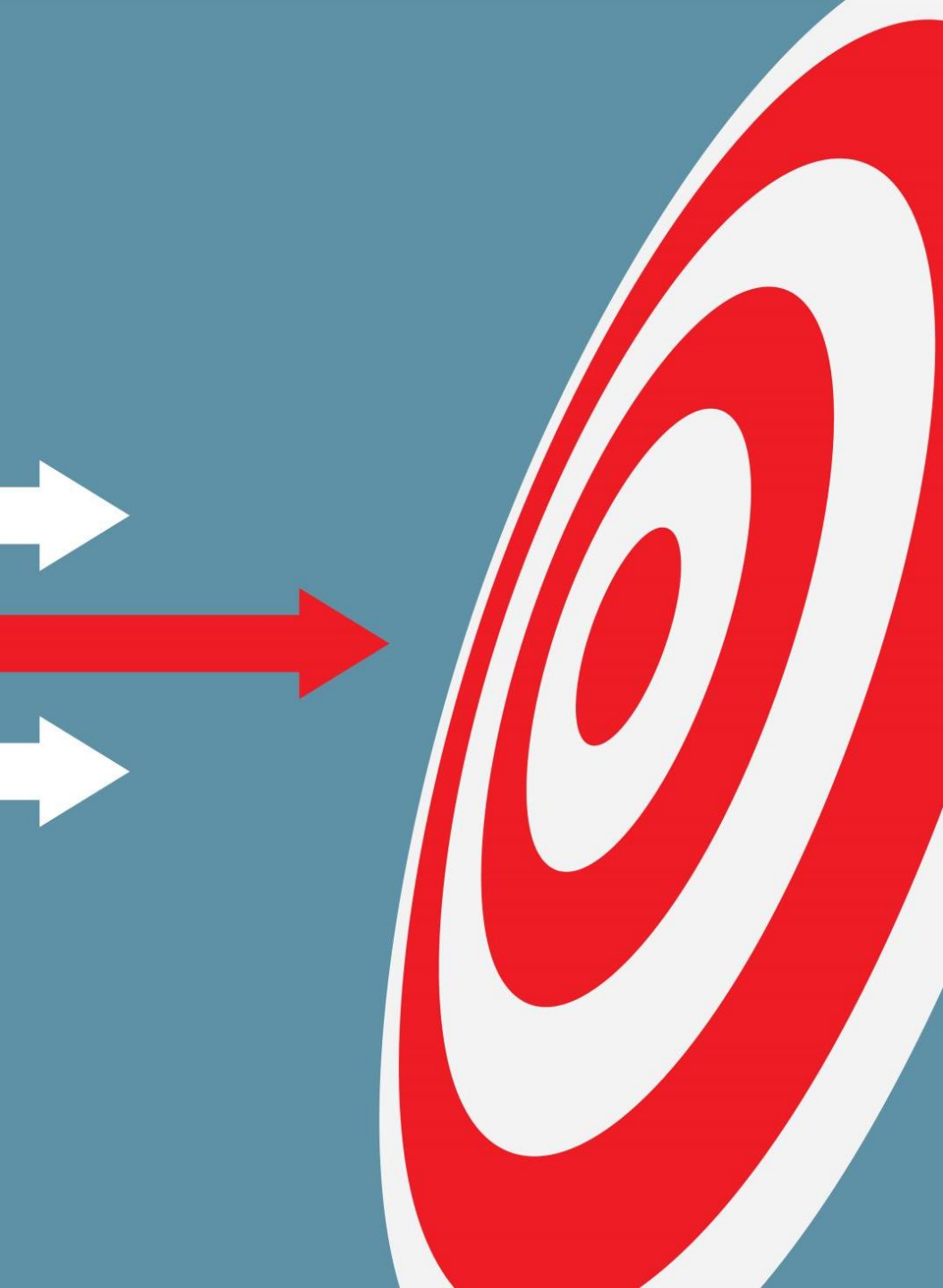
Officer Transition Resources

Due Date Checklist



Officer Transition Resources

Team Building



Officer Transition Resources

Goal Setting



Officer Transition Resources

Strategic Planning

Mission of the Chapter



"Why are we here? What is our purpose?"

Start with the Why – Simon Sinek

Identifying a mission, however, does more than justify an organization's existence.

Clarifying the purpose can eliminate a great deal of unnecessary conflict in an organization and help focus discussion and activity productively.

Mission of the Chapter

Your mission statement focuses on your beliefs.

Your mission statement must be future-oriented and portray your organization, as it will be, as if it already exists.

Your mission statement must focus on common purpose.

Your mission statement must be specific to the organization, not generic.

Your mission statement should be a short statement, or a series of statements.





Creating a Shared Vision

Vision Worksheet

Benefits of VISIONING

- **Breaks you out of boundary thinking**
- **Identifies direction and purpose**
- **Alerts stakeholders to needed change**
- **Promotes interest and commitment**
- **Promotes laser-like focus**
- **Encourages openness and creative solutions**
- **Encourages and builds confidence**
- **Builds loyalty through involvement (ownership)**
- **Results in efficiency and productivity**



VISION KILLERS

Tradition

Fear of ridicule

**Stereotypes of
people or roles
of officers**

**Complacency
of some
stakeholders**

**Fatigued
leaders**

**Short-term
thinking**

“Naysayers”

Goal Setting

Now we know what the chapter's Strengths, Weaknesses, Opportunities, and Threats are.



We also know the vision for where we want the chapter to go.



And, we know why we exist – our mission.



Timeline for Officer Transition

Fall Semester

- **Work with Eminent Commander to ensure the Chapter has a Strategic Plan and are using it**
 - **When Chapters don't have a plan, this leads to an unorganized approach, poor planning and poor execution by unprepared chapters**
- **Work with the Chapter Advisor and Alumni Advisory Board to review plan and solicit help**
 - **Alumni need advanced notice if they are going to help**

Timeline for Officer Transition

Fall Semester cont.

- **Ensure LEAD Phase 2/3 sessions are scheduled prior to mid-October**
 - **These sessions will help brothers build their skills and enhance their ability to get the work done.**
- **Ensure election schedule is determined and communicated**
- **Schedule mid-semester Strategic Planning session**

Timeline for Officer Transition



Spring Semester

- **Commander should take draft Strategic Plan to College of Chapters to share with cohort and get feedback**
- **Officers attend a Sigma Nu Institute Session**
- **Focus on improving areas for Pursuit of Excellence Program by adding new programs**



Questions?



Thank You!

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