



Officer Transition Retreat

THE PI KAPPA ALPHA FRATERNITY

PROPERTY OF

CHAPTER

Foreward

The contents of this handbook are the result of a compilation of information from various chapters and various brothers affiliated with the Pi Kappa Alpha International Fraternity for the use by any chapter which is interested in establishing or improving its officer transition retreat program. It should be understood that each chapter is self-governing and solely responsible for its day-to-day, week-to-week and month-to-month operation and nothing herein is intended as or should be deemed as supervision, direction, monitoring, oversight or as an effort to control the local chapter by the Pi Kappa Alpha International Fraternity, which is a fraternal affiliation of over 200 chapters, over 10,000 active undergraduate members and over 200,000 alumni and several nonprofit corporations, including, but not limited to Pi Kappa Alpha Corporation, a Tennessee nonprofit corporation which serves as a clearinghouse and an administrator for purposes of organizing meetings and conventions, publishing fraternal publications and performing other functions for the entire International Fraternity.

This handbook is an educational guideline only which contains suggestions and recommendations developed by various chapters which were able to develop successful officer transition retreat programs. It is published and available to any chapter through the clearinghouse in Memphis as a form of brotherly advice for whatever use one wants to make of it.

All ideas herein are optional and nothing is mandatory. Participation in officer transition retreat programming is by the voluntary choice of each chapter and each member with the understanding that one generally gets out of something what one is willing to put into it. Thus, any language contained herein which could possibly be construed as “mandatory” such as “do this” or “do that” is only in the form of a recommendation that if one wishes to get the most benefit out of using the suggestions in the handbook, then the suggestions can be utilized with the understanding that any handbook is, at most, a guide and that the users should substitute their own experience and judgment to use, adapt or modify the suggestions and recommendations contained herein. In other words, the handbook is a guide from which the users can use to establish, improve or build their own programs, using their own knowledge, common sense, ideas and experience and to assist the users from time to time as a reference for ideas and suggestions. In turn, each chapter is encouraged to share good ideas with other chapters by advising the administrative clearinghouse for possible inclusion in future publications.

Retreat Agenda

(Insert Date & Time)

Omega Omega Chapter

(Insert School Here)

- I. Opening – 10 minutes
- II. Discussion of the State of the Chapter – 15 minutes
- III. Leadership IQ – 30 minutes
- IV. Rush Seminar – 1 hour
- V. Meeting Effectiveness – 30 minutes
- VI. Chapter Vision – 15 minutes
- VII. Chapter Responsibilities – 15 minutes
- VIII. Officer Responsibilities 30 minutes
- IX. Chapter Goals – 15 minutes
- X. Officer Goals – 30 minutes
- XI. Calendar - 15 minutes
- XII. Comments/Questions/Reflection
- XIII. Closing

The Officer Transition Process

Why?

Transition can make the difference between a twenty-year-old chapter having twenty years experience or the same chapter having one-year experience, twenty times. Few events will affect the immediate future of the chapter more than the transition from one executive council to another. Organization and documentation are the keys to maintaining continuity to the life of the chapter - even through those challenging times.

Fundamentals of an Effective Transition Retreat

- 🔑 Hold after elections and prior to installation.
- 🔑 Mandatory attendance for all old and new officers should attend.
- 🔑 Have a written agenda.
- 🔑 Reserve at least a half-day to a full day.
- 🔑 Document all business in writing.
- 🔑 Leave time for fun after all business has been covered.
- 🔑 Mandatory attendance.
- 🔑 Basic expenses should be covered by the chapter (e.g. supplies and food).
- 🔑 No alcohol permitted.
- 🔑 Bring all necessary supplies (i.e. handbooks, by-laws, etc)
- 🔑 Set goals
- 🔑 Have the advisor attend the transition retreat

The three stages of the Transition Retreat

ONE:

- Review progress of chapter goals.
- Identify the strengths and weaknesses of the outgoing executive council.
- Discuss standard operating procedures (e.g. executive council meetings).

TWO:

- Breakout sessions matching each outgoing officer and officer-elect.
- Examine, in-depth, the responsibilities of each officer.
- Pass on relevant materials.
- Discuss recent accomplishments and the top priorities that require immediate attention.
- Question and answer period.

THREE:

- Bring the whole group back together.
- Brainstorm and identify the top priorities of the chapter.
- Set some goals based on where the chapter wants to be.
- Establish a general calendar.

DUTIES OF THE OUTGOING OFFICERS

President & Vice Presidents

- Organize a transition retreat and follow-up meeting.
- Provide a listing of all chapter rules, policies, and by-laws.
- Outline all rules, policies or by-laws amended or passed during the recent administrations. Indicate the date passed or implemented.
- Assure that the treasurer has followed steps outlined below.
- Provide a list of all monthly reports required by Memorial Headquarters.
- Explain international pledging and initiation fee structure.
- Explain IFC dues structure.
- Review the Standards for Retention of Membership.
- Collect all committee notebooks and materials to be turned over to the new chairmen.
- Review chapter consultant report from previous year.
- List all dates already set (e.g. formals, dinners, Founders Day, etc.).
- Provide samples of MHQ mailings (e.g. Forum, Bulletins, Rush Files, etc)

Treasurer

- Prepare paperwork for change of signatures on checks.
- Pay all bills received prior to end of term. Do not leave surprises for the new ThC.
- Pay all Memorial Headquarters assessments, dues, and fines prior to the end of term.
- List any contracts signed.
- List all expected major expenditures for the next few months.
- Provide a loose-leaf notebook or printout of all bank statements in chronological order.
- Provide a neat business checkbook in which all canceled checks have been taped to the appropriate stub.
- Provide a list of required periodic expenditures and the average of the amounts for telephone, entertainment, room rent, insurance, food, intramural costs, IFC dues, furniture, mixer costs, rental of party facilities, etc.
- Provide a clear ledger sheet for every member, indicating each member's payments and expenses.

Secretary

- Pass along past term's minutes.
- Provide a chronological list of due dates for all reports due to Memorial Headquarters.
- Review supply of all necessary forms and the manner in which they are to be completed.
- Discuss roll call procedure.

CHECKLISTS FOR NEW OFFICERS

President

- ✓ Meet with: Chapter Advisor, Greek Advisor, House Corporation President (if applicable), and Alumni Association President (if applicable).
- ✓ File Change of Officers Form.
- ✓ Review SMC Manual.
- ✓ Make plans to attend the Chapter Presidents Conference held each January in Memphis, Tennessee.
- ✓ Implement Officer Transition meetings.
- ✓ Supervise transfer of notebooks and materials.

Vice Presidents

- ✓ Appoint chairmen with executive council.
- ✓ Create committee notebooks/transfer old ones.
- ✓ Meet with chairmen.
- ✓ Assist the chairmen in appointing committees to each position.

Secretary

- ✓ Obtain and organize chapter files.
- ✓ Update membership records.
- ✓ Report any lost pledgings or initiations.