



ALPHA SIGMA PHI FRATERNITY
VP OF FINANCE

OFFICER TRANSITION MEETING

ALPHA SIG

INTRO TO OFFICER TRANSITIONS

LOGISTICS

Officer Transition Meetings are three-person meetings between the incoming officer, the outgoing officer, and a facilitator. The facilitator may be a Fraternity staff member, Fraternity/Sorority Advisor, Grand Chapter Advisor, or Chapter Council member. Up to 10 meetings will occur—one for each officer in the chapter. Plan for each meeting to last approximately one hour.

RECOMMENDATIONS

Officer Transition Meetings may be paired with the Chapter Planning Retreat and/or the Calendar Planning Retreat. Curriculum can be found on the Alpha Sigma Phi website under Officer Resources for the President.

SUPPLIES NEEDED

- Officer Roles and Responsibilities Handouts
- Copy of the Annual Report for Accreditation
- Laptop with Wi-Fi access

GOALS

- Outgoing officers will share all knowledge and resources with incoming officers that they need to be successful; the facilitator is present to guide the conversation and facilitate the transfer of this knowledge.
- Incoming officers will get answers to any questions they have about their positions.
- At the conclusion of each meeting, incoming officers will have a complete understanding of their role and responsibilities.

STRUCTURE

- Introductions/Purpose of Meeting
- Officer Roles and Responsibilities
- Annual Report for Accreditation Benchmarks
- Resources
 - From outgoing officer
 - Fraternity website, Youtube videos, and online officer training
- Ask and Share
 - Questions/advice
- Action Items

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INTRODUCTIONS/PURPOSE OF MEETING

OFFICER ROLES AND RESPONSIBILITIES

- Briefly review the officer roles and responsibilities.
 - This can be found on the Alpha Sigma Phi website under Resources
- Ask the outgoing officer to explain the more important points in detail.
 - Which responsibilities did you accomplish well? What was the most difficult aspect of your position?
 - What do you wish you knew about your position on the first day you took office?
- Ask the incoming officer which responsibilities he feels most comfortable and uncomfortable about.

ANNUAL REPORT FOR ACCREDITATION BENCHMARKS

- Discuss Annual Report metrics related to this officer.
- Ask the outgoing officer to provide some context.
 - What has the outgoing officer already accomplished?
 - Determine what is left to do and what can be improved upon.
- Where are our strengths? Where did we fall short? Why? What should the incoming officer focus on if they want to improve on last year's performance?

RESOURCES

- From outgoing officer:
 - Chapter billing letter
 - Budget
 - Vault
 - Chapter bank account (if applicable)
 - Receipts
 - Tax information
- Review Vault
 - Ensure the incoming officer has the access needed to complete his tasks. Review the following:
 - Chapter financial statement
 - Budgeting
 - Billing members
- Any additional resources?
 - Discuss any additional resources that the chapter or the outgoing officer uses outside of the resources provided by Fraternity staff.
- Navigate to the Officer Resources section of the Fraternity's website. Show the incoming officer how to get there and what is in his section.
 - Online resources/videos
 - Online officer training on MyAlphaSig
- Other resources to keep in mind:
 - Financial Advisor
 - Fraternity & Sorority Life office/advisor
 - Staff Coach

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ASK AND SHARE

- Topics for discussion:
 - Understanding/Managing the budget
 - Local dues collection/How to use Vault
 - Collections
 - Understanding chapter statement/all chapter fees
 - Payments to Fraternity Headquarters through Vault
 - Chapter taxes (990)
 - Fundraising goal
 - Past fundraising events
 - Fundraising impact on budget
 - Relevant campus policies for fundraising
 - Financial controls in place to safeguard against fraud
 - Contracts (outstanding and tips for executing)
 - Endowment (both temporary and permanent)
 - Sending delinquent brothers to collections
- What other questions does the incoming officer have for his predecessor?
 - If you had to start doing your job in full tomorrow, what would you feel most under-prepared for?
- Discuss time-sensitive items
 - What dates have already been set? What dates will we need to set?
- What advice/suggestions does the outgoing officer have for his successor?
 - Outgoing officer may be dismissed at this time.

ACTION ITEMS

- Share contact information for the Financial Advisor. Instruct the incoming officer to send a message to the advisor prior to the conclusion of your meeting.
- Share contact information for the OmegaFi CSR. Instruct the incoming officer to send a message to the CSR prior to the conclusion of your meeting.
- Decide when both officers (incoming and outgoing) will go to the bank to change the name(s) on the chapter's bank account.
- Create/finalize a budget.

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