

Officer Transition Training

Transition

1 hour 15 minutes

Session Objectives

- Provide open dialogue between outgoing and incoming officers
- Present the Lessons Learned document

Supplies Needed

- Officer supplies from the previous session
- Lessons Learned document
- Flip chart and markers

Facilitator Notes

- Both outgoing and incoming officers need to be present for this workshop
- It is also appropriate to invite advisors and your Domain Director

60 min	One-on-One
Instructions	Pair up each incoming and outgoing officer and have them go through the officer materials and Lessons Learned worksheet

15 min	Lessons Learned
Instructions	The outgoing officers present the Lessons Learned document created in the last session

Officer Transition Training

Training

5 hours and 30 minutes

Session Objectives

- Build relationships between the executive officers
- Educate officers on the national organization
- Cover appropriate policies and procedures (local and national)
- Emphasize the importance of communication
- Explore the purpose of their role as an officer in the Fraternity
- Create a Statement of Expectations for the e-board

Supplies Needed

- Officer notebooks and materials
- Teambuilding supplies (see below)
- Lessons Learned document
- Flip chart and markers
- Risk Management Policy (local and national), Crisis Management Policy, Financial Policy, Standards/Judicial Board, Recruitment/AM Registration/Initiation Policy

Facilitator Notes

- Both outgoing and incoming officers should be present for this workshop
- It is ideal for the following people to be in attendance: advisors, BOG chair, House Corporation president and Domain Director

Session Outline

60 min	Brotherhood Building Activities
	Chemical Spill (20 minutes maximum)
Supplies Needed	Tape or chalk 2 buckets Water Various sized bungee cords
Logistical Instructions	Tape or chalk two circles with four-foot radiuses approximately 10 paces apart Place one bucket in the center of each circle One bucket should have the bungee cords inside of it and the other should be halfway filled with water
Directions	<i>Inside a radioactive zone (the circle) sits a container of excess radioactive material looking suspiciously like a bucket half full of water. The material must be neutralized within a given period of time or the resulting meltdown could produce an ecological disaster. In another containment area (the other circle) nearby sits</i>

	<p><i>the neutralization receptacle. The device for moving the radioactive material was built by the lowest bidder, therefore, it has to be assembled by the team before it can be used. The only way to neutralize the material in the container is to construct the device and use it to move the can and pour the material into the neutralization receptacle. It is up to the team to figure out how to assemble the transportation device.</i></p> <p>Some other rules you need to keep in mind:</p> <ol style="list-style-type: none"> 1. People who step inside the circle or touch the material or the bucket will be incapacitated due to radiation exposure 2. Everyone must help operate the device or it will not work effectively 3. Spilling any material will result in dire consequences for the group 4. The neutralization receptacle can not be moved 5. You can only use the materials provided to you 6. Please ask if you need assistance
<p>Facilitator Note</p>	<p>The facilitator has the power to silence or make an individual disadvantaged. This is recommended for the purpose of discussing communication.</p>
<p>Processing</p>	<p>How did the group approach this task?</p> <p>What adjustments were made as the team tried to complete this task?</p> <p>Were all of the resources used effectively?</p> <p>What role did planning play in the success of the group?</p> <p>Who emerged as a leader?</p> <p>What leadership characteristics were important for this team?</p> <p>What do you wish we would have done in terms of leadership?</p> <p>How did communication, or lack of, affect the goal?</p> <p>Did anyone feel “lost in the shuffle”?</p> <p>For those who could not talk, how did that affect the group?</p> <p>What are the “radioactive chemicals” in the chapter?</p> <p>How can we work to “neutralize” them?</p> <p>Why is this activity relevant to an Executive Board?</p>

40 min	YOU! Activity
Instructions	<p>Each participant will need a copy of What/Who Made You Who You Are Today? worksheet</p> <p>Facilitator will read aloud the statements listed below</p> <p>Participants will then record their responses in the box starting with the box on the top and proceeding clockwise</p> <p>Are there any questions before we begin?</p>
	<p><i>Statements to read:</i></p> <p><i>Box #1: Which member of your family do you consider a role model?</i></p> <p><i>Box #2: What is your most important possession?</i></p> <p><i>Box #3: What part of yourself are you most proud of?</i></p> <p><i>Box #4: What quote/statement/phrase do you live your life by?</i></p> <p><i>Box #5: What is one thing no one would know by looking at you?</i></p> <p><i>Box #6: What is an event that has had a profound impact on you?</i></p> <p><i>Box #7: What quality or trait have you learned from one of your friends?</i></p> <p><i>Box #8: Anything else you would like to add?</i></p>
	<p>When you are finished, have each person pick two boxes they would like to share with the group.</p>
	<p>Note that it is important for you to know who you are and who your brothers are; that is what Fraternity is about, that is what Phi Kappa Tau is about.</p>

60 min	Overview of National Fraternity
Facilitator Note	<p>This portion of the retreat should be facilitated by one or more of the following people: advisor, national officer, Executive Offices staff member, BOG chair or House Corporation officer.</p> <p>All the necessary information can be found on the Fraternity website (www.phikappatau.org), in the National Constitution/Bylaws, Phi Kappa Tau History book, Membership Manual or by calling the Executive Offices at (800) PKT-1906.</p>
Instructions	<p>The facilitator should touch on the following aspects of the Fraternity:</p> <ul style="list-style-type: none"> • Brief history of Phi Kappa Tau • Structure/purpose (National Council, Foundation Board, Coordinating Council)

	<ul style="list-style-type: none"> • Role of Domain Directors • Role of Board of Governors • Role of House Corporation (if applicable) • Role of chapter leadership consultants • What is the North-American Interfraternity Conference? • The Executive Offices (who works there, purpose, resources) • The Phi Kappa Tau Foundation (purpose, services)
	Ask participants if they have any questions.

90 min	Policies and Procedures
Facilitator Note	This will more than likely be one of the hardest sections to facilitate. Policies and procedures are not the most exciting topics, nevertheless they are some of the most important.
Instructions	<p>You should break the e-board into groups of 2-3 and assign them each 1-2 policies to review.</p> <p>The goal is to pick the key points that everyone needs to know and create a five-minute presentation to present to the rest of the group.</p>
	<p>At the minimum, the following policies should be covered:</p> <ol style="list-style-type: none"> 1. Risk Management Policy (local and national) 2. Crisis Management Policy 3. Financial Policy 4. Standards/Judicial Board 5. Recruitment/AM Registration/Initiation Policy 6. Basic Chapter Expectations
	Ask the participants if they have any questions.
Facilitator Note	<p>The timing of this session will vary given the different sizes of the e-boards.</p> <p>In addition, the facilitator will need to move the group along. There should be about 45 minutes to review the policy, 20 minutes to plan the presentation and 25 minutes to deliver the presentation.</p>

45 min	Leadership
Instructions Activity #1	Facilitator begins by asking all members to stand and recite the creed of Phi Kappa Tau.

	<p>What were some of the words that spoke to you and why?</p> <p>Which line of the creed had the most meaning to you?</p> <p>Why does the Fraternity hold the creed in such a high standard?</p> <p>What is the difference between knowing and understanding the creed?</p> <p>What does the creed expect from you?</p> <p>What does the creed have to do with leadership?</p> <p>Why would we be talking about the creed during an officer training program?</p>
	<p>The creed is the lofty ideals that our founders set forth when they began this Fraternity more than 100 years ago.</p> <p>Not too long ago, the National Council created a mission statement for the Fraternity.</p>
FC	<p>Facilitator shows the mission statement of the Fraternity on the flip chart:</p> <p>“The mission of Phi Kappa Tau is to champion a lifelong commitment to brotherhood, learning, ethical leadership and exemplary character”.</p>
	<p>What is a mission statement?</p> <p>How do the creed and the mission relate?</p> <p>How is a mission statement used in an organization?</p> <p>How can we use the mission statement in this chapter?</p>
	<p>Hand out The mission of Phi Kappa Tau is to champion a lifelong commitment to... worksheet and have participants individually complete it.</p> <p>They will have five minutes.</p>
Facilitator Note	<p>Record the responses to #2 on a flip chart.</p>
FC	<p>Go through the worksheet answering the following questions:</p> <ol style="list-style-type: none"> 1. In your own words, what does this mean? 2. What specific goals do you have as an exec to “champion (among members) a lifelong commitment to”: <ul style="list-style-type: none"> *brotherhood *learning *ethical leadership *exemplary character

45 min	Expectations
	Given that we have discussed the mission statement, creed and goals we have for the Fraternity, we are going to spend the rest of the time talking about expectations.
	One of the basic expectations of Phi Kappa Tau, and consequently being a leader, is to be men of character.
	Facilitator introduces the definition of character: Character is simply values in action What does that definition mean to you? What are some examples?
	Facilitator introduces the GE Leaders statement. Use these values as an example to follow in constructing e-board's expectations
	Jack Welsch, former CEO of GE, developed this leader statement: GE Leaders...Always with Unyielding Integrity: <ul style="list-style-type: none"> • Have a Passion for Excellence and Hate Bureaucracy • Are Open to Ideas from Everywhere • Live Quality...And Drive Cost and Speed for Competitive Advantage • Have the Self-Confidence to Involve Everyone and Behave in a Boundary-less Fashion • Create a Clear, Simple, Reality-Based Vision...and Communicate It to All Constituencies • Stretch...Set Aggressive Goals...Reward Progress...Yet Understand Accountability and Commitment • See Change as Opportunity...Not Threat • Have Global Brains...and Build Diverse and Global Teams.
Instructions	Using all that we have talked about today, including the mission statement/creed/definition of character, your task as a group is to come up with your own leaders guide (i.e. expectation statement) that begins with: The Executive Board leaders of (chapter), always with unyielding character...
	You will have 30 minutes to complete this exercise. I will step out of the room and allow you to focus completely on this project. Please take it seriously. This is the document we will use to hold each other accountable.
	Are there any questions?

	After 30 minutes, the facilitator re-joins the group.
	<p>Tell me about the process you went through to create this statement.</p> <p>How did you apply to the process what we talked about today?</p> <p>What does this statement mean to you?</p> <p>How will we hold each other accountable to it?</p>
	Facilitator mentions that this statement is empty words on a piece of paper if participants do not act with character.

30 min	Wrap up
Facilitator Note	<p>Chairs are set in a circle and the gavel will be used.</p> <p>A badge and set of letters are placed in the middle of the circle.</p>
	<p>Facilitator offers some words of wisdom to the group.</p> <p>Facilitator reminds the group to earn their badge and letters each day, be a man of character, and that he/she has confidence in them to take the Fraternity to the next level.</p>
	<p>Facilitator explains that they are sitting in a Commitment Circle.</p> <p>Each person will have a chance to speak and will end by responding to the statement: I commit to...</p>

Lessons Learned...

Take a few minutes and reflect back on your tenure in office. Think about the successes and struggles that you encountered during that time. Be open and honest when filling out these questions because this will ensure that your successor will be able to take over the office with all of the knowledge available to him. This will ensure that the chapter's interworking will not stop during officer transition.

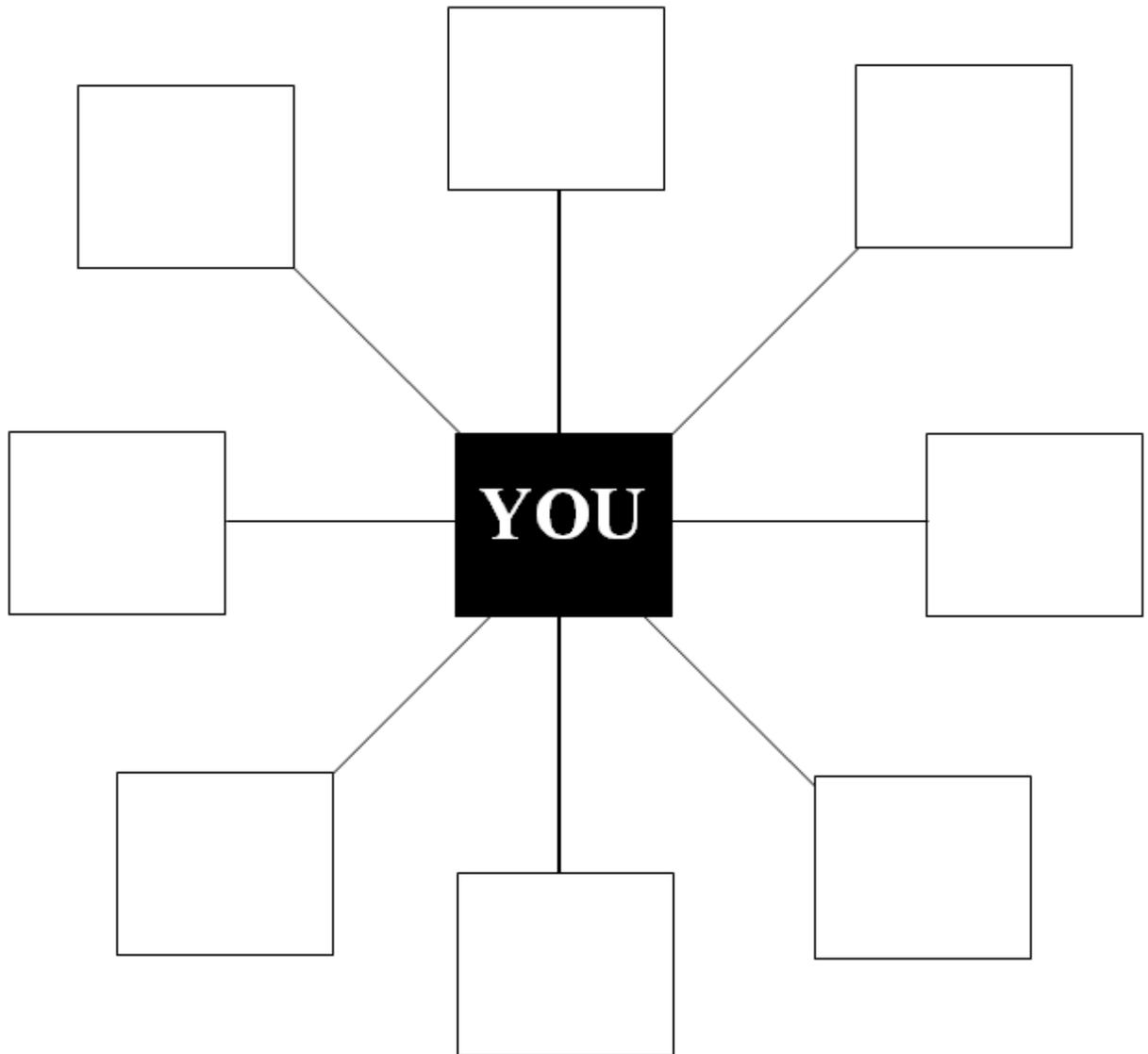
What skills did you need to be successful?

What resources are available to your successor?

What issues within the Fraternity does your successor need to be aware of?

What things do you know now that you wish you would have known then?

What/Who Made You Who You Are Today?



The mission of Phi Kappa Tau is to champion a lifelong commitment to...

Brotherhood	Learning	Ethical Leadership	Exemplary Character

List specific events and programs that you believe would fulfill the mission in each of the four listed areas.

Always with Unyielding Integrity

Jack Welch—Former CEO of General Electric

GE Leaders ... Always with Unyielding Integrity:

- Have a Passion for Excellence and Hate Bureaucracy
- Are Open to Ideas from Everywhere
- Live Quality...And Drive Cost and Speed for Competitive Advantage
- Have the Self-Confidence to Involve Everyone and Behave in a Boundary-less Fashion
- Create a Clear, Simple, Reality-Based Vision ... and Communicate It to All Constituencies
- Stretch ... Set Aggressive Goals ... Reward Progress ... Yet Understand Accountability and Commitment
- See Change as Opportunity ... Not Threat
- Have Global Brains ... and Build Diverse and Global Teams

Phi Kappa Tau Leaders ... Always with Unyielding Character: