

## **Sigma Alpha Mu- Officer Transition Program**

The Officer Transition is one of the most important functions of a successful chapter. Many chapters lack a well thought out transition program, which leaves newly elected officers reinventing the wheel. This set back will keep the chapter from capitalizing on any momentum the previous officers may have initiated. Furthermore, a newly elected officer has great enthusiasm and strong aspirations, without a well thought out transition this same officer becomes frustrated and loses a great deal of energy that could have been harnessed towards the goals of the chapter. By following this simple program newly elected officers will be well prepared to move their chapter in a positive direction and build on the work of past leaders.

### **Prior**

1. *The Prior should be elected two months before taking office and he should reside in the chapter house (If the chapter is housed). This gives the new Prior the opportunity to freely consult with the outgoing Prior before taking office.*
2. *Upon election, all materials of importance ranging from documents from the International Fraternity and the University should be passed down to the newly elected Prior to be reviewed. The Prior must be thoroughly familiar with all the rules and regulations of the University and of the Fraternity, and see that his chapter observes them.*
3. *The outgoing and newly elected Prior must together outline goals that the newly elected Prior would like to accomplish during his term. This enables the newly elected Prior to continue on the path that the chapter has chosen.*
4. *The outgoing Prior should attend the first few council meetings under the new Prior. This helps to facilitate a smoother transition.*
5. *The newly elected Prior should schedule a meeting with the Greek Advisor to discuss future goals and how they can be achieved. This will assist the new Prior create favorable public relations for the chapter with the University.*
6. *In addition to outlining goals, the newly elected Prior must also make a comprehensive timeline indicating when he expects goals to be attained. This timeline will be extremely helpful to the Prior in determining the progress the chapter is making.*
7. *The Prior must lead an executive council meeting once per week. These meetings will assist council in conducting a chapter meeting in an efficient and organized fashion.*
8. *Upon election, the current Prior must allow the newly elected Prior to sit in on council meetings. This gives the newly elected Prior the opportunity to get a feel for how these meetings are run.*
9. *The newly elected Prior should review with the Vice-Prior the Manly, Burke & Fisher pamphlet entitled "You've Won the Election!" that has been provided. This pamphlet gives you some basics on what to expect and prepare for once elected.*
10. *The Prior must go over the Chapter Performance Standards. This is how your chapter is rated. It covers all the areas of your chapter that should be focused on. It is also helpful to review past Field Rep reports.*

11. *The Prior must attend at least one nationally sponsored event after he has been elected.* It may be Chapter Leaders Day, Leadership Conference, or Convention.
12. *The previous Prior and Exchequer should meet with the current Prior and Exchequer before the council switches over to discuss a budget for the next year and the assessment of dues.* This meeting will provide consistency among councils to establish the chapter upon a sound monetary basis, which is extremely important in conducting a well-run organization.
13. *Meet with Chapter Advisor*
14. Contact the Executive Offices to provide new officer information and introduce yourself to the Executive Director or Assistant Executive Director, check on financial standing of the chapter and make sure the chapter is current on all obligations.
15. Visit Sigma Alpha Mu web site, SAM.org, to view available information.

### **Vice Prior**

1. *The Vice-Prior should be elected two months before taking office and he also must reside in the chapter house (If the chapter is housed).* This gives the new Vice-Prior the opportunity to freely consult with the outgoing Vice-Prior before taking office.
2. *Upon election, the new Vice-Prior must schedule a meeting with an officer in the Greek Advisor and the Alumni Advisory Board to thoroughly review all risk management policies governed by the Fraternity and University.* Reviewing these policies will ensure that there are no ambiguities or misunderstandings when the Vice-Prior should implement policy.
3. *The outgoing and newly elected Vice-Prior must together outline goals that the newly elected Vice-Prior would like to accomplish during his term.* This enables the newly elected Vice-Prior to continue upon the goals of his predecessor.
4. *If the newly elected Vice-Prior is not a council member before the time of election, he shall monitor all council meetings that occur until he is sworn in.* This helps to facilitate a smoother transition.
5. *The Vice-Prior will be responsible for setting up committee chair goal sheets to be filled out by the newly elected committee chairs.* One of the Vice-Prior's jobs is to supervise the committees.
6. *The newly elected Vice-Prior must also meet with the outgoing Vice-Prior to learn about the role of the committee chairs.* He must have a good understanding of the roles of each committee chair in order to guide them in the right direction.
7. *The newly elected Vice-Prior will review with the Prior the Manly, Burke & Fisher pamphlet entitled "You've Won the Election!" that has been provided. He almost must go over the Key as well as Chapter Performance Standards.* This pamphlet gives you some basics on what to expect and prepare for once elected.
8. *The newly elected Vice-Prior should review all materials of importance ranging from documents from the International Organization to the University.* As Risk Manager the Vice Prior should review the Risk Management Policy and the Risk Managers Manual.
9. *The Vice-Prior must attend at least one nationally sponsored event after he has been elected.* It may be conclave, a leadership workshop, etc.

10. *The Vice-Prior should also have a weekly committee chair meeting. These meetings will assist council in conducting a chapter meeting in an efficient and organized fashion.*
11. *Review New Officer Packet and the Sigma Alpha Mu web site, [www.Sam.org](http://www.Sam.org).*

## **Exchequer**

1. *The Exchequer should be elected two months before taking office and must also reside in the chapter house. This gives the new Exchequer the opportunity to freely consult with the outgoing Exchequer before taking office.*
2. *The Exchequer must schedule a meeting with a representative of the bank that the Fraternity utilizes to become a principal signatory agent on all Fraternity accounts and to get familiarized with the policies of the bank on issues such as minimum balances, late fees, and tax reporting. All accounts should require dual signatures.*
3. *If the newly elected exchequer is not a council member before the time of election, he shall monitor all council meetings that occur until he is sworn in. This helps to facilitate a smoother transition.*
4. *The newly elected Exchequer must meet with the current Exchequer to discuss all duties of his office. In order to conduct a well-run chapter, it is necessary that it be established upon a sound monetary basis.*
5. *The new Exchequer will be given all computer files and books before he takes office.*
6. *The previous Prior and Exchequer should meet with the current Prior and Exchequer before the council switches over to discuss a budget for the next year and the assessment of dues.*
7. *The new Exchequer should contact the Executive Offices to review the chapter's balance and payment terms.*
8. *The new Exchequer should review the Exchequer Information Sheet found on the web site, SAM.org.*

## **Recorder**

1. *The Recorder should be elected two months before taking office and must also reside in the chapter house. This gives the new Recorder the opportunity to freely consult with the outgoing Recorder before taking office.*
2. *The newly elected Recorder must meet with the current recorder to discuss his duties and to review all materials. There are many intricacies that need to be communicated to the new officer in this position.*
3. *If the newly elected Recorder is not a council member before the time of election, he shall monitor all council meetings that occur until he is sworn in. This helps to facilitate a smoother transition.*
4. *The Recorder should also create contact lists for the brotherhood for the school year and the summer. Communication within the chapter is very important.*
5. *The new Recorder should meet with his new council and the outgoing council to discuss the terms of the Chapter Performance Report. He should also work with the outgoing Recorder on the Chapter Performance Report packet. This report is an important part of the chapter rating you will receive at the end of the school year.*

6. *Review University and National Policies and required reports such as the Monthly Recorder's Report and the Annual Chapter Performance Report.*
7. *Review New Officer Packet.*

## **Committee Chairmen**

### ***House Manager (If Housed):***

2. *The House Manager should be appointed two months prior to taking office and must also reside in the chapter house. This gives the new House Manager the opportunity to freely consult with the outgoing House Manager before taking office.*
3. *The House Manager must meet with the outgoing House Manager to review the Risk Management Policy.*
4. *The House Manager is also responsible for the chapter house being maintained in a clean, safe, and orderly condition at all times.*
5. *The House Manager should contact any appropriate University or community Housing Authorities to familiarize himself with obligations.*

### ***Recruitment Chairmen:***

1. *The Recruitment Chairmen should be appointed for a **one-year term** two months prior to taking office and must also reside in the chapter house (If housed). This gives the new Recruitment Chairmen the opportunity to freely consult with the outgoing Recruitment Chairmen before taking office.*
2. *The newly selected Recruitment Chairmen are responsible for meeting with the outgoing Recruitment Chairmen before the end of the year to go over a brief plan for the following semester. This provides for a smooth transition between chairs.*
3. *The Recruitment Chairmen will be responsible for filling out the Committee Chair Goal Sheet created by the Vice-Prior.*
4. *Review Chapter Performance Standards regarding Recruitment.*

### ***Community Service/Philanthropy Chairmen:***

2. *The Philanthropy Chairmen should be appointed two months prior to taking office and must also reside in the chapter house (If housed). This gives the new Philanthropy Chairmen the opportunity to freely consult with the outgoing Philanthropy Chairmen before taking office.*
3. *The new Philanthropy Chairmen are responsible for meeting with the outgoing Philanthropy Chairmen before the end of the year to go over a brief plan for the following semester. This provides for a smooth transition between chairs.*
4. *The newly elected Philanthropy Chairmen will be responsible for filling out the Committee Chair Goal Sheet created by the Vice-Prior.*

5. *Review Chapter Performance Standards regarding Community Service.*

***Social Chairmen:***

1. *The Social Chairmen should be appointed two months prior to taking office and must also reside in the chapter house (If housed). This gives the new Social Chairmen the opportunity to freely consult with the outgoing Social Chairmen before taking office.*
2. *The new Social Chairmen are responsible for meeting with the outgoing Social Chairmen before the end of the year to go over a brief plan for the following semester.*
3. *The newly elected Social Chairmen will be responsible for filling out the Committee Chair Goal Sheet created by the Vice-Prior.*
4. *The newly elected Social Chairmen must meet with the outgoing Vice-President to review Sigma Alpha Mu's Risk Management Policy.*
5. *The newly elected Social Chairmen should review all materials of importance ranging from documents from the International Organization to the University. The Social Chairmen must be thoroughly familiar with all the rules and regulations of the University and of the Fraternity.*
6. *Review Chapter Performance Standards regarding Social.*

***Candidate Educators:***

2. *The Candidate Educators should be appointed two months prior to taking office and must also reside in the chapter house (If housed). This gives the new officer the opportunity to freely consult with the outgoing Candidate Educators before taking office.*
3. *The new Candidate Educators are responsible for meeting with the outgoing Candidate Educators before the end of the year to go over a brief plan for the following semester.*
4. *The newly elected Candidate Educators will be responsible for filling out the Committee Chair Goal Sheet created by the Vice-Prior.*
5. *The newly elected Candidate Educators must meet with the outgoing Vice-President to review Sigma Alpha Mu's Risk Management Policy.*
6. *The newly elected Candidate Educators should review all materials of importance ranging from documents from the International Organization to the University. The Candidate Educators must be thoroughly familiar with all the rules and regulations of the University and of the Fraternity.*
7. *Review Chapter Performance Standards regarding Candidate Education.*

***Scholarship Chairmen:***

1. *The Scholarship Chairmen should be appointed two months prior to taking office and must also reside in the chapter house (If housed). This gives the new Scholarship Chairmen the opportunity to freely consult with the outgoing Scholarship Chairmen before taking office.*
2. *The new Scholarship Chairmen are responsible for meeting with the outgoing Scholarship Chairmen before the end of the year to go over a brief plan for the following semester.*

3. *The newly elected Scholarship Chairmen will be responsible for filling out the Committee Chair Goal Sheet created by the Vice-Prior.*
4. *Review Chapter Performance Standards regarding Scholarship.*

***Historian:***

4. *The Historian should be appointed two months prior to taking office and must also reside in the chapter house (If housed). This gives the Historian the opportunity to freely consult with the outgoing Historian before taking office.*
2. *The new Historian is responsible for meeting with the outgoing Historian before the end of the year to go over a brief plan for the following semester.*
3. *The newly elected Historian will be responsible for filling out the Committee Chairman Goal Sheet created by the Vice-Prior.*
5. *The outgoing Historian should pass all materials over to the new Historian including pictures, the time line of your chapter, and any other information.*

***Alumni Recorder:***

6. *The Alumni Recorder should be appointed two months prior to taking office and must also reside in the chapter house (If housed). This gives the Alumni Recorder the opportunity to freely consult with the outgoing Alumni Recorder before taking office.*
2. *The new Alumni Recorder is responsible for meeting with the outgoing Alumni Recorder before the end of the year to go over a brief plan for the following semester.*
3. *The newly elected Alumni Recorder will be responsible for filling out the Committee Chair Goal Sheet created by the Vice-Prior.*
7. *The outgoing Alumni Recorder should pass all materials over to the new Alumni Recorder including alumni lists, banquet resources, and any other information.*

*\*This program was developed by Theta Chapter at the University of Pennsylvania and modified by Sigma Alpha Mu professional staff to assist all chapters*