



KAPPA KAPPA PSI
NATIONAL HONORARY BAND FRATERNITY

OFFICER TRANSITION PROTOCOL FOR THE FIRST 30 DAYS

KAPPA KAPPA PSI
★ MUSICIANSHIP • LEADERSHIP • SERVICE

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KAPPA KAPPA PSI NATIONAL HONORARY BAND FRATERNITY OFFICER TRANSITION PROTOCOL FOR THE FIRST 30 DAYS

An important and often overlooked process in Kappa Kappa Psi chapters is officer transition. Each academic year, new officers and leaders are elected or appointed in the chapter. To allow the chapter to continuously move forward in the right direction, the transferring of knowledge must take place. Information about positions, goals, accomplishments and setbacks, events, awards, operations, and traditions must be passed down from one person to the next to prevent the incoming members from having to “recreate the wheel.” This document provides guidelines to have a successful officer transition. It is highly advised that the officer transition is completed within the first thirty days after officer elections, but before the end of the academic quarter/semester. As a result, officer elections should occur no later than 30 days before the end of the academic quarter/semester.

Ideally, a person planning to run for a specific position should meet with the current officer before the election to gain a full understanding of the position and what it entails.

TASKS

There are several key elements to consider for a successful officer transition. The following tasks should be considered:

- Outgoing officers
 - Complete the Officer and Chapter Update Form in the OMRS
 - Complete *outgoing officer team evaluation*
 - Create a binder (or use Dropbox, Google Drive, or a flash drive) containing all of the documents used throughout the term of office
 - Complete an *end of term report*
 - Establish a 1:1 transition meeting with incoming officer
- Incoming officers
 - Arrange meeting with Sponsor and Director of Bands
 - Review position description in chapter constitution
 - Establish a 1:1 transition meeting with outgoing officer
 - Complete *incoming officer questionnaire*
 - Establish a transition retreat with other incoming officers
 - Make signature changes on the on-campus and/or off-campus banking accounts, including all officers and Sponsor/Director of Bands as your chapter constitution and/or banking institution requires

“Each member helps build or destroy a reputation.”

OUTGOING CHAPTER OFFICERS

Outgoing officers are integral to a successful officer transition. Each outgoing officer should take time to prepare their materials to maximize the effectiveness and efficiency of the time spent with the incoming officer.

1	<i>Outgoing officer team evaluation</i> As a team, you should spend time considering your actions throughout your term in office. By providing responses to the questions below, you are better prepared to offer insight and guidance to those incoming officers.
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1. As an executive council, have we developed our members in a way that is consistent with the vision and mission of the fraternity? Describe the efforts of the executive council.
2. Which of the programs, events, and activities provided were our most successful? What contributed to that success?
3. What was our greatest achievement as an executive council?
4. Do we have any goals left unaccomplished? If so, why? What prevented us from achieving our goal?
5. Looking forward, what should our successors achieve? Why are these goals important?

2	<i>Document sharing</i> Be sure to create a binder, indexed and tabbed, containing all of the documents used throughout your term of office. If it's easier (or in addition to) transfer all of the files to a flashdrive or upload them to a group Dropbox or Google Drive folder providing access to all of the incoming officers.
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Items you want to consider including are:

- Vision, mission, and values of KKPsi
- Constitution, Bylaws, Policies
- Job descriptions of officers
- Description of committees
- Chapter membership list (including outgoing officer contact info)
- Important documents related to that office (minutes, agenda, financial records)
- Listing of basic annual procedures and deadlines (found at kkpsi.org)
- Sample chapter calendar with officer responsibilities
- Resource or contact list of important people (DOB, Sponsor, Headquarters, National Council, District Council, District Governors)
- Copy of previous officer reports and recommendations for upcoming year

3

End of term report | This report will provide the incoming officer a more intimate look at the position. It also provides you as the outgoing officer the opportunity to provide some additional suggestions to improve the position within the chapter.

Projects and Goals: List your projects and goals for your term in office. Did you accomplish the goals? Who else worked with you on a project or goal? What made the project or goal successful if completed? How are reports and projects archived?

Concerns: Did you encounter any problems or disappointments during your term of office? Provide ways of avoiding or correcting them.

Supplemental materials: Other than the items in #2 above, what other information should be passed along to your successor? Include campus contacts, ongoing contracts, community resources, etc.

Timeline: Provide your weekly or monthly calendar. How can this calendar be improved for efficiency and effectiveness?

Other: How else can your successor carry out the responsibilities of this office? What recommendations do you have for your successor?

4

Transition Meeting | Be sure to establish a 1:1 transition meeting with incoming officer to review all of the above information. This meeting will most likely be more than an hour, and it's best to host this meeting where there will be few distractions.

Items to review during this meeting:

- Outgoing officer team evaluation
- Officer binder (or Dropbox, Google Drive, flashdrive)
- End of term report
- Life management (page 7)
- Time management

INCOMING CHAPTER OFFICERS

Incoming officers are integral to a successful officer transition. Each incoming officer should take time to prepare their materials to maximize the effectiveness and efficiency of the time spent with the outgoing officer.

As incoming officers, you should seriously consider your desire to assist the members of the chapter. Remember, Kappa Kappa Psi's vision is to promote and advance a vibrant and diverse college band movement through purposeful programming, unified messaging, and excellence in service and operations. How will you support this vision? How does your position support this vision?

1	<i>Review position description</i> As a new officer, you should spend time considering your actions throughout your term in office. Be sure to review the position description. Remember, everything the outgoing officer is going to share with you is new information. Be prepared to take notes!
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Checklist:

- Create a list of questions for the outgoing officers
- What are your ideas for the position?
- Review any historical files for the position including the constitution, budget, or institutional policies.
- Review kkpsi.org and kkytbs.org; how to use the OMRS

2	<i>Transition meeting</i> Be sure to establish a 1:1 transition meeting with outgoing officer to review all of the above information. This meeting will most likely be more than an hour and it's best to host this meeting where there will be few distractions.
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Items to review during this meeting:

- Outgoing officer team evaluation
- Officer binder (or Dropbox, Google Drive, flashdrive)
- End of term report
- Life management (page 7)
- Time management

3	<i>Incoming officer questionnaire</i> This will provide you with a roadmap for your term in office. Be sure to spend some time thinking about each level of your position. Your responses to these questions also provide you the opportunity to enhance and build upon the accomplishments of your predecessor.
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1. What is the purpose of my office?
2. What are my responsibilities?
3. Using the ideas you listed and the conversations from your transition meeting, create your goals for the position. Be sure to utilize the SMART goal method. Does the outgoing officer have any thoughts or suggestions to improve your goal?
4. What are the first five things I should accomplish? How will I accomplish them?
5. Complete this sentence: At the end of my term in office, I want to be sure members:

4	<i>Transition retreat</i> Be sure to establish a transition retreat with all incoming officers to review all of the above information. This retreat can be up to a half day of activity and discussion. It's best to host the retreat where there will be few distractions.
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As new officers, you'll want to create and agree upon common expectations and norms for the team and be sure all of the officers are aware of the positions and their duties. The first part of the retreat will focus there. The second part will be a time to discuss how you move the chapter forward.

SAMPLE INCOMING OFFICER RETREAT AGENDA

It is highly advised that this retreat is held within the first thirty days after officer elections, but before the end of the academic quarter/semester.

Team-building Activities | 20-30 minutes

Expectations/Norms of the Team | 40 minutes

- Take time to think critically through each question.
 - Each member of the team should be provided an opportunity to share a response.
1. What are you most excited about in terms of working with this team?
 2. What is your biggest concern about working with this team?
 3. What would our chapter look like if we met all of our goals?
 4. What would our chapter be like if we meet none of our goals?
 5. What are your expectations of other members of the team?

Personal and Team Goals | 60 minutes

- Give the entire team a chance to review their individual goals from the *Incoming officer questionnaire*. This is also an opportunity to seek feedback and guidance from other officers.
- What does this team want to be known for at the end of the term? Identify three to five team goals.

Break | 15 minutes

Prioritize the Goals | 45 minutes

- View “**The time you have (in Jelly Beans)**” on Youtube
 - How do we as a team prioritize what we want to accomplish?
 - What is most important to accomplish in the short term? In the long term?

Team Learning | 45-60 minutes

- View “**Why Your Critics Aren’t The Ones Who Count**” by Brene Brown on Youtube
 - What are the main ideas of this video?
 - What impact do these ideas have on our leadership?
 - Have a group conversation and share thoughts and ideas.

Wrap up | 15-30 minutes

- Are there any unanswered questions?
- How will each officer support the vision and goals of the fraternity and chapter?

LIFE MANAGEMENT

Student leaders are not only organization leaders, but also students, friends, and family members. There is more to a student leaders' life than the organizations they lead. A key to balancing all the different roles student leaders must take on requires effective use of their time. The following are some brief hints on how to make the most of your time and some suggested personal characteristics of good time managers.

- **List your goals** | Start with long-term goals, and identify short-term goals that will keep you on track. Set priorities for yourself in each role you must fulfill (student leader, student, personal life).
- **Make a weekly or daily "to do" list** | Set priorities, create a calendar, do what you say you will do.
- **Always ask yourself...** | "What is the best use of my time right now?" "How can I improve?" "Am I making the most of each interaction or situation?"
- **Do it NOW** | Do not procrastinate. Remember every report or project is just several smaller tasks put together. Take each element one at a time and plan for other people who you may need to complete a task.
- **Delegate** | Assign tasks to other officers and members. Do not try to complete everything on your own. Providing others with responsibilities enables them to learn more about the fraternity and build their capacity as a leader.
- **Avoid officer isolation** | Far too often, chapter officers feel an isolation due to specific responsibilities, a sense of duty, lack of communication, or lack of engagement from the chapter. Chapter officers should meet with their committees monthly, share responsibilities, and encourage each other.
- **Take time for yourself** | You are no good to your organization, family, or friends if you are not 100%. Take time to work on your mental, emotional, and physical well-being.