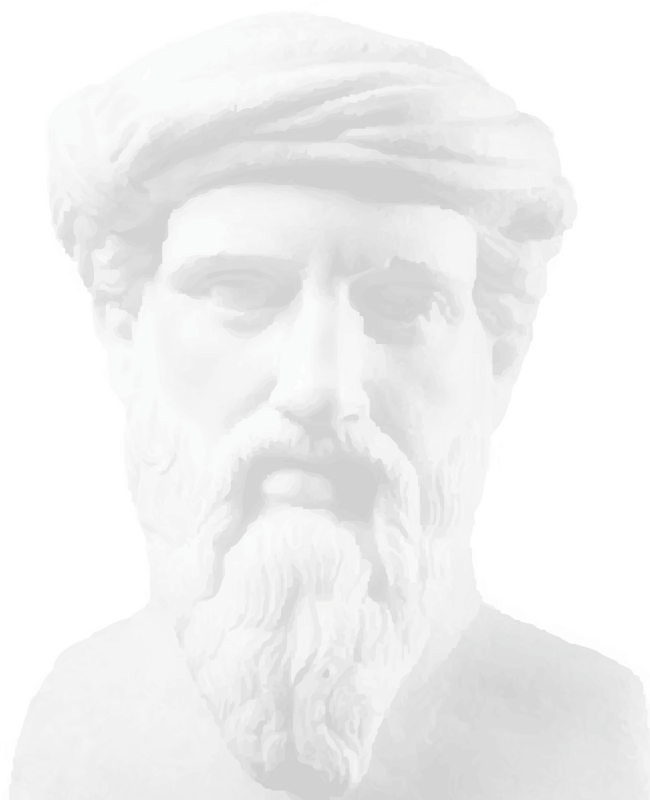


ACACIA FRATERNITY  
GOLD BOOK SERIES

# OFFICER TRANSITION

PREPARING THE NEXT GENERATION OF LEADERS



2011 EDITION

## Officer Transition and Training: The Key to Your Chapter's Success

The heading correctly identifies the importance of officer transition; the key to your Chapter's future lies in officer transition and training. **Officer transition and officer training are not the same.**

**Officer transition** is the passing of information, records, suggestions, and responsibilities from out-going to newly elected officers. Transition is the "handing off" of the tools needed during a new officer's training.

**Officer training** includes any & all meetings, planning sessions, or discussions that take place in order for the new officer to build the skills necessary to do the job.

The transfer of power and knowledge is important to the future survival of any chapter. Officer transition is too often ignored or poorly done, leaving a chapter's new officers with very little insight as to how to perform their jobs, what responsibilities they have, or even their exact duties.

**Just as with officer transition, the anticipation and guaranteed need for officer training can make it easier than most organizations make it appear.** The needs and purpose of training, however, require added considerations, which do make planning slightly more difficult. By design, training can be used to educate officers on their responsibilities, and to create a cohesive group among the Chapter's leadership.

This Gold book is dedicated to helping your Chapter move through officer transition and training as smoothly as possible. In the coming pages you will find checklists and ideas that will help Executive Councils maintain continuity within the Chapter from year to year.

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# Transition Checklist

## Outgoing Officers

- ✓ **Create/Update Officer Binder** – See Officer Binder section on page 3 for what should be included
- ✓ **Update Officer Timeline** - Use this process of creating a timeline to give your successor proper expectations of his workload in the coming months.
- ✓ **Complete Officer Evaluation** – Use this form to do some self-evaluation of your time in office see pg. 6
- ✓ **Update Activity and Project Reports** – Use this form after events for self-evaluation and to make suggestions for the future see pg. 9
- ✓ **Have the Active Chapter complete:**
  - **Chapter Self-Evaluation Form** pg. 7
  - **Chapter Performance Index Form** pg. 8
- ✓ **Attend Officer Retreat** – Use this time to pass on advice and resources to the man taking over your position

## Newly Elected Officers

- ✓ **Announce Change of Officers to International Headquarters/University**
- ✓ **Review Officer Binder** – Take time look through your new responsibilities, and understand the suggestions from past office holders
- ✓ **Review Officer Timeline** - Review this document to gain an understanding of when critical tasks are to be completed
- ✓ **Set Goals for time in office** – Goals should be S.M.A.R.T. -
  - Specific - *is the goal stated clearly & specifically?*
  - Measurable - *how will I be able to measure or prove that I've been successful?*
  - Attainable - *is this goal realistic given my current circumstances?*
  - Relevant - *is this goal congruent with what I'm all about & what our Fraternity is all about?*
  - Time- Oriented - *does my goal include a date at which it will be completed?*
- ✓ **Attend Officer Retreat** – This is the time to share goals for the next year, meet with the previous office holder to understand his experience in office
- ✓ **Meet with Chapter Advisor** – The Chapter Advisor will be a good resource for setting and meeting your goals
- ✓ **Meet with Campus Officials** – Meet with any school officials that you may be associating with during your term in office

## **Officer Binders**

The key to officer transition is **having an effective way to pass on important information from year to year**. The creation of officer binders is a top priority for successful chapter officers. These binders should contain **all information that is pertinent for an officer to do his job**.

An officer binder contains but is not limited to the following items:

- ◆ University Mission Statement
- ◆ Acacia Mission Statement (Preamble)
- ◆ Office Role/Responsibilities
- ◆ Office Gold Book (available from Acacia Headquarters)
- ◆ University Academic Calendar
- ◆ Chapter Calendar
- ◆ Laws of Acacia
- ◆ Chapter Bylaws
- ◆ IFC Bylaws
- ◆ Contact information
  - Acacia International Headquarters
  - Chapter Advisor
  - Chapter Corporation Board
  - University Student/Greek Affairs
  - Events (Venues/Vendors)
  - Publications (Student and Local Papers)
- ◆ Archives
  - Past Calendars
  - Event/Activity/Project Ideas
  - Activity and Project Reports (pg. 9)
- ◆ Any other information useful for a specific office

**FAQ - Do I have to use a physical binder?** NO - however you do need to utilize a format that is **easily updated & easily transferrable**. Here are a few ideas for the format of the officer binder:

- 1) a physical binder with copies of every relevant document
- 2) a flash drive or “jump drive” with every relevant document
- 3) shared documents online with GoogleDocs (utilizing your chapter’s Google Account @acacia.org or a separate account)
- 4) shared notebooks on a web application such as Evernote ([evernote.com](http://evernote.com))

## Officer Timelines

Creating an officer timeline is one of the best ways that you can ensure success over the coming year.

**If you are an outgoing officer** & did not have an officer timeline handed over to you, follow the steps below to brainstorm some of the most important actions you took over the past year.

**If you are an incoming officer** & have not received an officer timeline from the previous officer, follow the steps below to brainstorm anticipated actions over the coming year. Once you have got your timeline mapped out, be sure to transfer that information into whatever planning system you use (i.e. Google Calendar, planner, notebook, agenda, appointment book) in order to have your reminders set in place.

An officer timeline is essentially just a way to map out the most important actions to be taken in each month of the year. It is articulated in this form as a way **to help an officer fully understand the steps that often need to be taken far in advance of the actual event or activity.**

For example, if your chapter has an annual alumni weekend in late March, there are actions that need to happen as early as December or January in order to notify alumni, reserve a space to meet, coordinate any activities, etc. If you wait until March to plan the event, it will not happen & you will have many grumpy alumni members wondering why you didn't "get on this before now."

The guidelines stated below may not cover 100% of all details that you need to be thinking about, so be sure to review this document with your Chapter Advisor, House Corporation Board President, or any other relevant alumni advisors.

### **Guidelines for Creating Officer Timelines:**

- 1) Start a new word processing or spreadsheet document & make a heading for every month of the year
- 2) Ask yourself, "What are the events, activities, & projects that will need to be planned for throughout the year?" & "When do I need to take action on each of these to ensure successful execution?"
- 3) Fill in information as it comes to your mind & continue to fill in information as it will continue to come into your mind as you get closer to the activity.
- 4) Review the Officer Timeline Mind Jogger list fill in relevant actions
- 5) Transfer all of this information into your calendar or planner, or whatever will remind you when these events are getting near
- 6) Finally, as mentioned previously, review this list with your alumni advisors to see if there is anything that you are forgetting
- 7) Now follow the plan!

In the **Appendix** of this document you will find the following:

- Officer Timeline Mind Jogger list
- example Officer Timelines from the Kansas State Chapter of Acacia Fraternity

### **Guidelines for Updating your Officer Timeline as an Outgoing Officer:**

- 1) Review your Officer Timeline and ask yourself, "Knowing what I now know, are there any activities that would run more smoothly if I took action a bit sooner in the calendar?"
- 2) Indicate what those actions would be on the Officer Timeline before handing off to Incoming Officer

## **Outgoing Officer Evaluation**

**Directions** – Many of these questions are geared toward former, or out-going officers. They should be considered carefully and communicated to the newly elected officer. New officers can use these questions to brainstorm ideas or goals for the upcoming term of office. **Make copies or multiple documents if needed.**

1. Office: \_\_\_\_\_
  
2. What are the responsibilities of this office?
  
  
  
  
  
  
  
  
  
  
3. What were the Chapter's objectives and goals for the past year?
  
  
  
  
  
  
  
  
  
  
4. In what areas did you succeed this year? What/Who helped you succeed?
  
  
  
  
  
  
  
  
  
  
5. In what obstacles to success did the chapter face during your term?
  
  
  
  
  
  
  
  
  
  
6. In your opinion, rank the obstacles or issue that will require attention within the next year?
  
  
  
  
  
  
  
  
  
  
7. What should be done immediately in the next semester?

## **Activity/Event Report**

Complete three (3) of these reports for the most important activities or events throughout the year. **Make copies or multiple documents if needed.**

---

Date:

Event:

How was event put together?

Was this event successful? Explain what made it a success.

Were there problems with the event? (setup or actual event)

Would you encourage doing this event again?

What, if anything, could be done to make this event more valuable or easier to organize?



## **Officer Training Checklist**

The following is a list of suggested topics for officer training. Knowledge of these topics will help new officers to understand their role as an officer, and help them to accomplish their goals for the Chapter.

- ✓ International Organization
  - Organizational Structure
  - Constitutional Policies and Procedures
  - History and Traditions
  
- ✓ Local Chapter
  - Organizational Structure
  - Constitutional Policies and Procedures
  - History and Traditions
  
- ✓ Officer Development
  - Role and Responsibilities of Position
  
- ✓ Campus
  - Who's who – Key University Officials
  - Recognition Standards
  - Judicial Policies and Procedures
  
- ✓ Community
  - Who's who – Key Officials
  - Schedule of large community events

## **Officer Retreat**

The best way to go about officer training is executing an officer retreat. This retreat is a great opportunity to:

- introduce new officers to the topics listed on the preceding Officer Training Checklist,
- conduct meetings between incoming and outgoing officers, and
- set Chapter goals or Officer-Specific for the next year.

Some other **advantages** to the officer retreat include:

- Development of a sense of **cooperation and teamwork** among officers
- **Problem solving and goal-setting** at the management level
- Provide **continuity** and maintain **momentum** between changing administrations
- **Orientation of new officers** to the full range of chapter leadership efforts
- **Collaboration** of leadership efforts

**When?** - The best times to hold an officer retreat include:

- Immediately following chapter elections
- During fall (or spring) semester orientation
- Whenever the executive council loses its sense of organization, direction, or cooperation

**Who?** - Those that should be involved with an officer retreat are the Incoming Officers, Outgoing Officers, and Chapter Advisor.

**Where?** - Acacia HQ recommends that you get away from the chapter house! Go reserve a room at the Union, or at your local Masonic Lodge, or at a restaurant, or at an alumni members house. Getting out of the house removes many of the distractions that can delay this meeting actually being completed.

For information and ideas on planning an officer retreat refer to the **Chapter Retreat Gold Book**, many of the ideas related to a Chapter Retreat are the same to keep in mind for an Officer Retreat.

## **Appendix - Documents**

List of Documents:

- 1) Chapter Self Evaluation Form
- 2) Chapter Performance Index
- 3) Officer Timeline Mind Joggers List
- 4) Example Officer Timelines (from Kansas State Chapter)

## Chapter Self-Evaluation Form

<b>Involvement</b>	<b>Rating</b>
Manpower	1 2 3 4
Executive Council	1 2 3 4
Leadership Potential	1 2 3 4
Chapter Committees	1 2 3 4
Goals	1 2 3 4
Recruitment	1 2 3 4
Pledge Education/Member Development	1 2 3 4
Finances	1 2 3 4
Social	1 2 3 4
Scholarship	1 2 3 4
Human Service	1 2 3 4
Campus Involvement	1 2 3 4
Campus Reputation	1 2 3 4
Public Relations	1 2 3 4
Alumni Relations	1 2 3 4
Chapter Advisor	1 2 3 4
Financial Advisor	1 2 3 4
Ritual Exemplification	1 2 3 4
Housing	1 2 3 4
International Relations	1 2 3 4

Place in order of importance those areas of weakness that need immediate attention.

- 1.
- 2.
- 3.
- 4.
- 5.

## Chapter Performance Index

---

The International Council of the Acacia Fraternity had adopted a set of objectives/goals/standards that indicate satisfactory performance. The Chapter may gain an objective measure of its overall performance by using the following self-evaluation based on the Acacia standards of performance. **Each member should evaluate the Chapter according to this index.** If a Chapter's overall performance could rate higher, the evaluation form can be studied to determine specific points of weakness.

1. Does the Chapter have a membership equal to or greater than the average fraternity chapter size on campus?

	Yes	3 points
	No	0 points
  
2. Does the Chapter determine specific recruitment goals each year?

	Yes	2 points
	No	0 points
  
3. At least 95% of men pledged are initiated 4 points  
At least 75% of men pledged are initiated 3 points  
At least 50% of men pledged are initiated 2 points  
Less than 50% of men pledged are initiated 1 point
  
4. Does the Chapter pledge program have written goals and guidelines for their achievement?

	Yes	3 points
	No	0 points
  
5. Does the executive council meet on a regular basis?

	Yes	3 points
	No	0 points
  
6. Does the Chapter hold one retreat per year for all members?

	Yes	2 points
	No	0 points
  
7. Is the Chapter represented by at least two actives at each International Event?

	Yes	1 point
	No	0 points
  
8. Do Chapter officers attend one officer retreat per year?

	Yes	1 point
	No	0 points
  
9. Does the Chapter have a Chapter Advisor?

	Yes	3 points
	No	0 points
  
10. Does the Chapter have a Financial Advisor?

	Yes	3 points
	No	0 points

- |   |     |          |
|---|-----|----------|
| 11. Does the Chapter have a legally incorporated housing corporation according to state law and meeting specifications of the <i>Laws of Acacia</i> ? | Yes | 3 points |
|   | No  | 0 points |
| 12. Does the Chapter publish at least two alumni newsletters per year?  | Yes | 3 points |
|   | No  | 0 points |
| 13. Is the Acacia ritual memorized by those responsible for conducting its use?   | Yes | 2 points |
|   | No  | 0 points |
| 14. Does the Chapter have a written budget?   | Yes | 3 points |
|   | No  | 0 points |
| 15. Does the Chapter have an accounts receivable problem?   | Yes | 0 points |
|   | No  | 2 points |
| 16. Is the average of pledge and active G.P.A.s equal to or above the all men's average?  | Yes | 3 points |
|   | No  | 0 points |
| 17. At least 75% of members are involved<br>in a campus activity outside the chapter  |     | 3 points |
| At least 50% of members are involved<br>in a campus activity outside the chapter  |     | 2 points |
| Less than 50% of members are involved<br>in a campus activity outside the chapter   |     | 1 point  |
| 18. Is the Chapter an active member and participant<br>in the local Interfraternity Council?  | Yes | 3 points |
|   | No  | 0 points |
| 19. Does the Chapter participate in the International Human<br>Service Project each year? <i>i.e. Acacia Claus/7 Days of Service</i>                  | Yes | 3 points |
|   | No  | 0 points |
| 20. Does the Chapter have a functioning and effective committee system?   | Yes | 2 points |
|   | No  | 0 points |

Total Score \_\_\_\_\_ Points

Evaluation Key

- |              |                           |
|--------------|---------------------------|
| 40-50 points | Above average performance |
| 30-39 points | Average performance       |
| 20-29 points | Below average performance |
| 00-19 points | Serious attention needed  |

## **Officer Timeline Mind Joggers**

This list is to remind you of common activities & events that would be your responsibility. Review this list when creating your Officer Timeline to identify any actions in the months leading up to your activity that may be necessary for success. The list below should be considered by all officers. The list is general enough to apply to any officer. Feel free to expand on this list for future officers.

### **Process:**

- 1) ask yourself, "Is there anything regarding \_\_\_\_\_ that I will need to do in order to achieve success?"
- 2) ask yourself, "If so, what will I need to do & when?"
- 3) fill this info into your calendar, planner, or other system as a reminder of action to be taken, and
- 4) fill this info into your Officer Timeline that you will hand off to the next brother to have this position

### **Mind Joggers List**

- Beginning of the Semester
- End of the Semester
- Moving into the House, & Moving Out of the House
- Events that will Require Collaboration with other Officers
- Events that will Require Collaboration with other chapters on-campus (including sororities)
- Presenting information or reports during Chapter Meetings
- Presenting information or reports during Exec Meetings
- Presenting information or reports during Meetings with Acacia Alumni
- Informing Alumni
- Informing Acacia Headquarters
- Informing your campus greek affairs office
- Informing your local or campus newspaper (i.e. press releases to celebrate accomplishments)
- Attending Acacia International Fraternity Events (i.e. Conclave & Acacia Leadership Academy)
- Archiving & saving all required information to be submitted to Acacia Headquarters to be considered for the Chapter Excellence Awards & Malcolm Award
- Submitting all required information to Acacia Headquarters to be considered for the Chapter Excellence Awards & Malcolm Award
- Attending mandatory campus events / activities
- Recruiting new members during formal recruitment
- Recruiting new members via scholarship recruitment or summer recruitment
- Recruiting new members during informal recruitment or "continuous open bidding"
- Recruiting new members through campus organizations
- Recruiting new members through campus-wide events
- Recruiting new members through referrals from others (i.e. Acacia Alumni, sorority members, friends)
- Educating new members about "how we do things here"
- Educating new members about "what they can expect because they are a new member"
- Educating new members about "what they can expect once they are an active member"
- Reminding graduating seniors about ways to stay involved after graduation
- And the list goes on & on... What else would you add to this list?

### **Example of Completed Officer Timeline**

- \* On the following pages, you are being provided with a couple of examples of what a completed Officer Timeline would look like. The example is from the Kansas State Chapter, one of our chapters that has some of the most positive momentum going right now!
  
- \* Yours doesn't need to be this detailed on the first draft. The Kansas State Chapter has been refining this document over the course of a couple of years.





## **JANUARY / FEBRUARY**

- ☒ The Venerable Dean’s term of office officially begins at the Saturday of Acacia Celebration Weekend during the Induction of Officers Ceremony at the conclusion of Initiation
- ☒ Both the Venerable Dean and the Venerable Dean-Elect will share communication throughout the vacation break with all plans for the future semester being coordinated by the VD-Elect.
- ☒ Items on the docket the **FIRST TWO WEEKS** of January:
  - Finalize a date for the house to open; ensuring the Senior Steward will be present to help turn everything on. Typically the weekend prior to classes starting on Thursday. Inform each member as soon as the date is set, they will want to know.
  - Post the schedule for opening weekend on the Chapter website and inform each member and alum, this is “Acacia Celebration Weekend” and should include plans for: the Man of Acacia Celebration and Initiation, Senior Man of Acacia Board Meeting, Spring Semester Retreat, First Chapter Meeting, and Induction of Officers. (see Acacia Celebration Weekend notes below)
  - Confirm with the Ritual Chairman and Senior Dean that the Lodge has been secured for MOA Celebration
  - Set date and times for Executive Council meetings throughout the semester. Typically on Mondays at 9PM. Encourage standing committees to meet prior to Exec meetings every week.
  - Set a Chapter Schedule. This is always difficult during January and February. Check the K-State Men’s Basketball schedule and avoid any Wednesdays that members may want to attend the game. Sunday evenings have been used to substitute a game week. These dates require a Chapter approval vote at the first meeting in January. Chapter should return to every Wednesday in March.
  - Set an outline for the semester calendar. The big calendar items that must be sought after **PRIOR** to classes starting are: Chapter nights, Scholarship Interview Weekends, Spring Formal, and Leadership Weekend.
  - Get Committees organized and decide how you will separate members into each committee. These assignments should be given during or before the retreat.
  - Review the Grade Report released by Greek Affairs office. Discuss the results with the Scholarship Chairman and notify the Risk Management Chairman and the Judicial Council if scholarship hearings need to be held, refer to Constitution.
  - **IMPORTANT:** Read through the Laws of Acacia, Chapter Constitution, House Policies, Standing Rules of Order, etc. Understand how they relate, work, interconnect, and overrule each other. Be able to communicate the information properly to the Chapter members without referencing the books, you should know the rules that protect **YOU** and the **CHAPTER**.
- ☒ **ACACIA CELEBRATION WEEKEND**
  - Outline of Weekend:
    - Thursday: First day of classes, Welcome Back
    - Friday



## Venerable Dean's Monthly Timeline

*Last Updated: August 2011*

- 5:00pm – Eat Dinner
    - 6:00pm – Begin MOA Celebration
  - Saturday
    - 8:00am – Continue MOA Celebration
    - Noon – SMOA Start Board Meeting (at the Lodge)
  - Sunday-Monday
    - Spring Chapter Retreat (at a separate location beyond the Chapter House is mandatory)
    - Monday should be no classes; Martin Luther King, Jr. Day
- Reminders:
  - Ensure that the Ritual Chairman and you have all materials needed
  - Ensure that the badges have arrived from International Headquarters
  - Ritual passages are memorized by officers as recommended
  - All Alumni are informed and strongly encouraged to attend (WE NEED THEM!). Use the Alumni database to send out an email to all active alumni.
  - Work with Alumni Chairman and Chapter Advisor to set Board Meeting time and location, also if lunch/dinner is provided
  - Create temporary shingles to give to the new MOA at the final day of Celebration. Use the template in the Celebration folder. You will need to install the “Certificate” font. After Celebration, order the official shingles from the Headquarters office by submitting the membership records.
- ☒ For the Second Chapter Meeting in January (see Constitution)
  - Appoint the following officers:
    - Homecoming Chairman
    - Intramural Chairman
    - IT Chairman
    - Two Recruitment Committee members
    - Three Nominating Committee Members
    - Two Nominating Committee Members (SMOA)
    - Four Judicial Council Members
  - Some of the officer positions may be delayed and you may wish to add officers, but it is recommended that a vote is taken to delay if you wish.
  - Approve the chapter schedule. Make sure each date is clearly listed and visible.
  - Approve the YMOA supplement if necessary.
  - Remind the members that the North side of Hunting, directly across from the chapter house, cannot be taken by parking. Our neighbor runs a business, and requires that space for parking.
  - Perform the induction ritual immediately afterward, and close with the ritual closing.
- ☒ Be sure to WATCH OUT for:
  - IFC Anti-Hazing & Dry Recruitment Forms due
    - Must be read at Chapter; also require Chapter Advisor signature
  - Financial, Census and Roster Updates due
    - Refer to past updates in VD Notebooks, make copies to fill notebook
  - Risk Management Meetings
  - Greek LEADS / Roundtables



## Venerable Dean's Monthly Timeline

*Last Updated: August 2011*

- IFC President's Retreat
- ☒ Officer Information Update on ICS
- ☒ Acacia Leadership Scholarship Weekends
- ☒ House Bills Due / Ensure SMOA Rent is paid

### **MARCH**

- ☒ Out of house requests
  - Review Article 02-07.
  - Hold an Out-of-House Request Meeting for MOA wishing to live outside of Chapter House.
  - Petitions must be received at least one week prior to vote
  - Requires 2/3 vote
  - Get signature on OOH contract at chapter when OOH status is granted
- ☒ In-house

### **APRIL**

- ☒ Recruitment Experience Weekend
- ☒ Greek Week

### **MAY**

- ☒ See the Exec Development Folder to create goals for your officer team to accomplish over the summer break. Do not let these three months go with no development of the Chapter.
- ☒ Keep the chapter quiet and comfortable during finals week.



## **JUNE**

- ☒ Compile and Complete Conclave Awards Packet on even numbered years (much bigger project than anticipated), work directly with as many officers and alumni as is feasible to complete packet.
  - If your term does not coincide with a Conclave year, use the Conclave packet to steer your vision planning. All that you need to get the Malcolm is contained in that packet – make sure you’re continuing to address *all* the issues contained.
- ☒ Host weekly Conference Calls with Executive Council (focus on future improvements, goals)
- ☒ Encourage review of Constitution, House Policies, Standing Rules of Order, work with Judicial Council for review
- ☒ Contact International office and stay current with relations
- ☒ Start Conclave preparations

## **JULY**

- ☒ Contact another chapter president and pick his brain on whatever subject
- ☒ Prepare for Executive Council retreat
- ☒ Host Executive Council retreat
- ☒ Encourage Senior Dean to prepare for Chapter retreat
- ☒ Stay in contact with Headquarters, check to ensure programming is congruent with Cornerstones
- ☒ July 10<sup>th</sup> – Work with Chapter Advisor, Treasurer/Secretary to start the newsletter, it should be published by the first week of the semester
- ☒ JULY 15<sup>th</sup> – Send out email with New Member Profiles
- ☒ Stay in contact with all New Members, this should be your main responsibility on the Recruitment committee, helping the transition from signed to move-in, don’t loose touch with anyone, ensure a bid card and housing contract is signed ASAP!
- ☒ July 25<sup>th</sup> – Work with Senior Dean to assign room assignments



## **AUGUST**

- ☒ 4<sup>th</sup> – Contact Neighborhood Association representative and inform them of the dates the Chapter will be returning and discuss any previous issues within neighborhood
- ☒ 5<sup>th</sup> – Contact Lee School principal (Dr. Kole) and offer to host faculty meetings prior to the start of school and see where partnership opportunities are.
- ☒ Make arrangements for initiation:
  - Decide move-in date: if a sufficiently small amount are pending initiation, the ritual can be completed in one day, implying a Thursday MOA move-in day.
  - Ensure that the Ritual Chairman and you have all materials needed.
  - Ensure that the badges have arrived from International Headquarters
  - Ritual passages are memorized by officers as recommended.
  - All Alumni are informed and strongly encouraged to attend (WE NEED THEM!). Use the Alumni database to send out an email to all active alumni.
  - Create temporary shingles to give to the new MOA at the final day of Celebration. Use the template in the Celebration folder. You will need to install the “Certificate” font. After Celebration, order the official shingles from the Headquarters office by submitting the membership records.
- ☒ CONCLAVE YEAR (even numbered years) – Take Credentials, Ritual Books, etc.
- ☒ Schedule of Events
  - SMOA work day
  - Exec move-in day
  - MOA move-in day
    - Initiation
    - Initiation discussion
    - Rules meeting
  - YMOA move-in day
    - Serenading Practice
    - YMOA integration and rules meeting
    - Brotherhood event
  - Retreat
    - Breakout sessions
    - Brotherhood events
    - Serenading practice
- ☒ Info to MOA about YMOA – make powerpoint or slideshow with names, pictures, and relevant information
- ☒ *OPENING WEEK:*
  - Info to leave on new member’s desk when they arrive:
    - Copy of housing contract for each family, signed and executed



## Venerable Dean’s Monthly Timeline

*Last Updated: August 2011*

- Mothers’ Club information packet / Six Meanings of Acacia
- Billing info
- Emergency Info / Young Man Record to fill out
- Items to copy so that EACH member including new members have a copy:
  - Constitution, House Policies, Standing Rules of Order
  - Calendar (semester and first week items)
  - Newsletter
  - YMOA Education Supplement (YMOA only)
  - “An Acacian’s Pledge”
- Opening Night Meeting
  - Review Vocabulary
    - MOA vs. Active, YMOA vs. Pledge
  - History (original 4, 1999, 2001, 2008)
  - Emergency Contact Forms
  - Schedule for the week
  - VD’s contact info
  - Expectations of attendance
  - Alcohol Policy
  - “An Acacian’s Pledge”
  - Calendar
  - Appointments
  - Conclave Recap (even years)
  - YMOA Education Supplement Approval
  - Parking Assignments
  - Serenading
  - Strategic Plans
  - Website Profile Pictures (first month)
  - This is your chance to define the culture of the house to the YMOA. Tell them what they need to be the ideal Acacian – inspire them and get them excited!

### ☒ 1<sup>st</sup> chapter meeting

- No CORE in lieu of induction ritual
  - IMPORTANT: report all inducted YMOA to internationals immediately
- Appointment of officers:
  - 3 Nominating Committee members
  - 4 Judicial Council members
    - Sophomore, Junior, and Senior classes should be represented
    - Out-of-house members should be represented
    - The scholarship chairman should be included
  - Homecoming Chairman
  - Intramural Chairman
  - IT Chairman
  - Alumni Relations Chairman (if needed)
  - Sustainability Chairmen (if needed)
- Approve YMOA supplement if needed



## Venerable Dean's Monthly Timeline

*Last Updated: August 2011*

- Remind the members that the North side of Hunting, directly across from the chapter house, cannot be taken by parking. Our neighbor runs a business, and requires that space for parking.
- Approve chapter schedule

## OCTOBER

### ☒ HOMECOMING

- Send official flower to sorority pairing on Monday of HC week
- Ensure HC Chair makes all deadlines, forms turned in, financial situation taken care of
- Review alcohol policy and speak with members about drinking during HC events, no alcohol at pumping, yard art, etc.
- Assign individual chairs for each event
- Host two or three short meetings with Acacia homecoming chairs and event chairs to go over ways to have strong participation and include each member in events
- ATTEND EVERY EVENT, support your Brothers
- Go to practices and help where needed, participate in an event
- Nominate two Freshman/Sophomores for the Up and Coming Greek Leader Awards and Greek Servant Award --- IMPORTANT!!!
- Remember, this week is about public relations, we must come out of this week with a positive image
- Go to the sorority pairing and write on their cars with car chalk, writing ACACIA on them with fun sayings, i.e. This AdPi thinks Acacia men are hot!
- Send out press release on Up/Coming Greek Leader (if have a winner) and a final review of each placing and homecoming results

### ☒ Last Week of October

- Work with Lucas Shivers (SMOA Scholarship Committee) and the Scholarship Chairman to review last year's K-State Acacia Local Scholarship Packet. Make any changes, be ready to distribute on November 1<sup>st</sup>.
- Distribute Election Packet / Intent to Runs
- Contact Nominating Committee Members and Set-up a meeting for November



## **NOVEMBER**

- ⊗ 1st DAY OF NOVEMBER --- Hand out Scholarship Packet for both local and national scholarships, DUE NOV. 15<sup>th</sup>
  
- ⊗ ELECTIONS
  - Refer to the Constitution for all Election Materials
  - First Chapter Meeting in November – Distribute Intent to Run Forms
  - Nominating Committee must meet and deliver slate at least 72 hours prior to election meeting, DO NOT RELEASE slate prior to that day.
  - Nominating Committee
    - Make sure to reiterate that they are only to eliminate a candidate from the office they wish to serve in if:
      - They do not meet the requirements according to the Constitution
      - They would not benefit the Chapter in the office
      - The office would not benefit the member
    - Multiple names should be slated for each office if forms turned in.
  - 72 Hours Prior to Election Meeting – Post slate on the bulletin board and send via email
  - Election Meeting – tba
- ⊗ Scholarships- DUE NOVEMBER 15th
  
- ⊗ Second Week of November – Begin preparations for Transition Meetings
  - Schedule a time for an Officer Transition Retreat
  - Used the Alumni Center Conference Rooms before, visit [www.k-state.com](http://www.k-state.com)
  
- ⊗ Send Report of Officer Elections to BOTH HQs and Greek Affairs ASAP!
  
- ⊗ Christmas Decorations





## December

- ☒ Announce that Brothers may not stay in the Chapter House over Holiday Break
- ☒ Update Monthly Timelines / Notebooks
- ☒ Last Meeting
  - Vote on Membership Questions
  - Absences, etc. for IFC Grade Reports
- ☒ Items to complete PRIOR TO LEAVING for break:
  - Ask the VD-Elect to set a date for the house to open in January, ensuring the Senior Steward will be present to help turn everything on. Typically the weekend prior to classes starting on Thursday.
  - Set the schedule for opening weekend, this is “Acacia Celebration Weekend” and should include plans for: the Man of Acacia Celebration and Initiation, Senior Man of Acacia Board Meeting, Spring Semester Retreat, First Chapter Meeting, and Induction of Officers. (see Acacia Celebration Weekend notes in January)
  - Confirm with the Ritual Chairman and Senior Dean that the Lodge has been secured for MOA Celebration
  - Order enough Badges from International Headquarters to have at Initiation, usually takes several weeks, so order early to be safe!
- ☒ Christmas Cards
  - Send via mail by the 5th of the month, work with Treasurer/Secretary
- ☒ Door Code
  - Have the door codes changed on the final day the house is open, YOU are the last to leave along with the Senior Steward
- ☒ House Closing



## Weekly Things:

- ☒ Setting Up for Chapter
  - POGOs
  - Black ACACIA tablecloth
  - Gavel and Sounding Block
  - Agendas (20) and supporting materials
  - Ensure that the main deck is in perfect shape and that the Wednesday dinner crew is ready by 5:30pm
- ☒ Email Update
  - An update should be sent to the Chapter each week, highlighting the approaching calendar
  - See the examples included in the files
- ☒ Calendar Update
  - Be sure to relay all calendar items, dates, and times at least **THREE** different ways (via email, bulletin board, notes, dry-erase board, etc.)
- ☒ Brother of the Week
  - Accept nominations at Exec meeting each week
- ☒ Press Releases
  - Your responsibility will be to **WRITE** the releases for each major approaching event and work with the Treasurer/Secretary to assign multiple articles
  - **YOU** are the public relations officer for the Chapter
- ☒ Exec Meetings
  - Agenda
  - Reminder Email

## Random Things to Know:

- ☒ IFC Greek LEADS are difficult to motivate officers, challenge them to find the positives
- ☒ Take an inventory every 4 weeks, update yourself and officers where we are at
- ☒ 850 free copies at Greek Affairs every year (1 cent per page after that), usually used for recruitment/ALS
- ☒ Keep Mom Ann in the loop on events, details, COREs, etc.
- ☒ The Bulletin Board is your responsibility, work the Treasurer/Secretary to keep it up
- ☒ Mom’s Club is functioning, keep in touch with the officers
- ☒ International Conclave Awards and Awards in general should **ALWAYS** have an Acacia application, do not let one slip away.
- ☒ It is tradition for the Venerable Dean to create a signature ‘call sign’ to end each email they send. It describes a lot about your term as an officer and the culture you want to establish between brothers. Examples include:
  - Ben Connell – “El Presidente”
  - Justin Geist – “The Bus Driver”
  - Brett Eakin – “Together,…”

**Secretary/Treasurer Monthly Timeline**

Last Updated 8/2/10

**JANUARY**

- ▲ The incoming Secretary/Treasurer has full control over The Acacian Newsletter to be produced at the beginning of the Spring Semester.
- ▲ Work with the outgoing Secretary/Treasurer, Venerable Dean, Chapter Advisor, Lucas Shivers, and Brett Eakin for guidance.
- ▲ Set a deadline to have articles submitted for the newsletter. Ideally, this should be around January 10<sup>th</sup>, allowing enough time for you to edit the articles and have a draft ready to present at the Board of Directors Meeting in January.
- ▲ Publish The Acacian Newsletter, usually printed at Staples, and mail to the alumni, families, and campus administrators.
- ▲ The checkbook must be signed over in January.
- ▲ Set a due date for semester rent. Typically this is February 1 for both the monthly payers and those members who pay in bulk. The due date for rent for the members paying monthly is the 1<sup>st</sup> of each month. Typically, a grace period of 15 days is allowed for monthly payers, with a 2% late fee incurring on any late payments.
- ▲ Ensure all files are updated with the outgoing Secretary/Treasurer, including the December MOA Budget Report.
- ▲ Work with the outgoing Secretary/Treasurer and Senior Man of Acacia Finance Chairman for the Man of Acacia Budget, Fred Loseke, to file the Federal and State Tax forms.
- ▲ Update the K-State Student Union Meal Plan.
- ▲ Learn how to write minutes and manage the spreadsheet files.
- ▲ Pay the bills on time.
- ▲ Pay rent to Senior Men of Acacia and mail to the Topeka mailing address.
- ▲ Work with Venerable Dean to update the mail room labels and bulletin board.
- ▲ Coordinate with outgoing Secretary/Treasurer on changing the VISA cards to the Venerable Dean and Secretary Treasurer.
- ▲ Be sure to write reimbursement checks to all members who give you valid receipts
- ▲ Work with the Venerable Dean and Senior Steward to get the house credit cards switched over to new officers
- ▲ Make sure your name is on the checking account at Kansas State Bank

**FEBRUARY**

- ▲ Complete the January Budget Report and send to Fred Loseke for review by February 10<sup>th</sup>. Present the report at the next Chapter Meeting.
- ▲ Collect and deposit the semester rent.
- ▲ Pay rent to Senior Men of Acacia and mail to the Topeka mailing address.
- ▲ Notify Gary Haag (Board of Directors Chairman), Michael Meyers (Senior Man of Acacia Finance Committee Chairman), and Fred Loseke (MOA Budget) of those members who haven't met their financial obligations after the grace period has expired, February 15<sup>th</sup>.
- ▲ Pay the bills on time, and watch for initiation fees from the International Fraternity.
- ▲ Stay on top of reimbursement requests.

**MARCH/APRIL**

- ▲ The process should start to become VERY cyclical, but continue to stay motivated and stay on top of your duties.

- ▲ Complete the February and March budget reports by the 10<sup>th</sup> of the month and send to Fred Loseke for review. Present them to the Chapter.
- ▲ Collect March and April rent at the 1<sup>st</sup> of the months. Notify Gary Haag and company if a member becomes delinquent in paying his bills.
- ▲ Pay bills on time.
- ▲ Pay rent to the Senior Men of Acacia.
- ▲ Hold the mail over Spring Break if no one is staying at the Chapter house.
- ▲ Work with the Venerable Dean in securing Housing Contracts for the next academic year.
- ▲ Complete the Federal and State Taxes in April for the 1<sup>st</sup> Quarter report.
- ▲ Coordinate with the Venerable Dean, Lucas Shivers, and Brett Eakin on press releases about the Chapter's activities. These releases are posted on the Chapter website and sent via e-mail to the alumni through Constant Contact, a monthly Chapter update to alumni, campus administrators, and families.

### **MAY**

- ▲ Complete the Term Report and update the monthly timeline as necessary.
- ▲ Complete April budget report and send to Fred Loseke by the 10<sup>th</sup> of the month as usual.
- ▲ Ensure that ALL reimbursements are made before leaving for summer break.
- ▲ Make plans for the mail over break, and switch trash service from Waste Management from WEEKLY to MONTHLY Service.
- ▲ Decide with the Venerable Dean what the Men of Acacia plan to sponsor for the annual STAG Weekend in June.
- ▲ Work with the Recruitment Chairmen on drafting the New Member Packet (Opening Weekend Information, Housing Contracts, Bid Cards, etc.) for the New Young Men of Acacia. This should be sent via mail to the YMOA by the end of May at the latest.

### **JUNE/JULY**

- ▲ Make sure the mail is forwarded to an address at which you can receive it in order to pay bills
- ▲ Although reimbursement requests are nonexistent, ensure that the bills are paid on time for the summer months. Sometimes this is very difficult, so stay motivated.
- ▲ Work with Venerable Dean, the Chapter Advisor, Lucas Shivers, and Brett Eakin on coordinating the fall edition of The Acacian Newsletter. Again, set a deadline for article submittals and edit a draft before returning to campus in August.
- ▲ File the Federal and State Taxes in July.
- ▲ The summer months can be slow from a Secretary/Treasurer's perspective, but this is a great time to work with the Executive Council to discuss how best to further develop the Chapter. STAY MOTIVATED!

### **AUGUST**

- ▲ In many ways, the fall semester is extremely similar to the spring semester.
- ▲ Finish the July budget report and send to Fred Loseke for review.
- ▲ Draft and publish the Acacian Newsletter. This should be routine now.
- ▲ Set up the K-State Student Union Meal Plan.
- ▲ Ensure that each new YMOA has a copy of the Constitution, House Policies, and Standing Rules of Order. Copy the signed Housing Contract for the new Young Men of Acacia and their families. Also, they should have a calendar of opening weekend events, YMOA Supplement, Mothers' Club Info, Six Meanings of Acacia, and payment plan description.

- ▶ Set a due date for semester rent bills.
- ▶ Pay all bills on time.
- ▶ Switch trash service back from MONTHLY to WEEKLY.
- ▶ Finalize the new Fiscal Year budget with Fred Loseke and send to the Senior Men of Acacia Board of Directors for approval.

### **SEPTEMBER**

- ▶ Pay August and September rent to the SMOA.
- ▶ Approve the new Fiscal Year budget after presenting to the Chapter.
- ▶ Finish August budget report and present to Chapter.
- ▶ Collect and deposit rent checks.
- ▶ **STAY ON TOP OF REOMBURESEMENT REQUESTS!**

### **OCTOBER**

- ▶ Pay monthly rent to SMOA
- ▶ File Federal and State Taxes.
- ▶ Homecoming activities become hectic with reimbursement requests. Stay motivated. Meet with financial representatives from the homecoming pairing to divvy up homecoming expenses.

### **NOVEMBER**

- ▶ The process by this point should be self-explanatory.
- ▶ Work with Venerable Dean on preparing the Chapter Christmas Cards.
- ▶ After Elections, begin the transition period with the incoming Secretary/Treasurer.

### **DECEMBER**

- ▶ Finish the November budget report and send to Fred Loseke and the incoming Secretary/Treasurer.
- ▶ Ensure ALL reimbursement requests are complete before leaving for Christmas Break.
- ▶ Hold the mail over break.
- ▶ Coordinate the production of The Acacian Newsletter with the incoming Secretary/Treasurer. The incoming officer has full control of the publication, but you are ultimately there for guidance and advice. Help in any way possible to make the incoming officer feel welcome and comfortable since this is a slap in the face of a start for him.
- ▶ Complete term report and monthly timeline as necessary.

### **JANUARY**

- ▶ The events that were completed for the incoming officer are completed again. The outgoing officer should assist.
- ▶ Reflect on your term. It officially ends during the Installation of Officers during Man of Acacia Celebration Weekend.
- ▶ Provide advice to the new officer throughout the semester. Many questions will undoubtedly arise.

## Recruitment Timeline

### November

- Officer transition
- Set application due date (usually beginning of February)
- Send out scholarship letters to all schools and organizations by December 1<sup>st</sup>
  - Includes letter, application, and brochure
  - Principals and counselors
  - Boy Scouts, FBLA/DECA, Rotary, FFA, HSLC, Alumni

### December

- Letters sent out to top candidates on IFC list before Christmas break
- Call IFC potential members on IFC list during Christmas break

### January

- Plan out interview dates for ALS during 1<sup>st</sup> executive meeting
  - Last two weekends of February
- Send out reminder email to schools and organizations during first week back to school
- Set dates for experience weekends before end of month
  - One before spring break
  - One in the month of April
- Begin receiving applications
  - Keep organized
  - Send application confirmation via email
    - Within in 48 hrs of receiving application

### February

- Once all applications received
  - Make scans of applications to PDF
  - Add all names to spreadsheet on gmail account
- Send invitations for interview dates to applicants via email
- Plan for interview weekends
  - Alumni need to be present, ideally 10
- After interviews are Completed
  - Call applicants within 48 hrs of interview
  - Compile interview score sheets
- Extend bids with approval of selection committee

### March

- Continue contact with PNMs

- Via phone
- Make visits to PNMs
- Experience weekend before spring break
  - Basketball game a possibility
- Get contracts to top PNMs as soon as possible

### **April**

- Continue to arrange visits with PNMs
- Continue getting contracts
- Get new members registered with ICS

### **May, June, July, August**

- Continue reaching out to PNMs until recruitment goal reached

### **Fall Semester**

- Continue recruitment of spring class
- Prepare for officer transition
  - Update documents