THE SOAR GUIDE

2025-2027 Biennium

This guide outlines need-to-know information related to SOAR, Pi Beta Phi's Premier Officer Development Program.

SOAR
WITH PI BETA PHI

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WHAT IS SOAR?

SOAR, Pi Beta Phi's Premier Officer Development Program, focuses on the Success, Orientation, Advancement and Retention of Pi Beta Phi International Officers.

The comprehensive SOAR program enables officers to achieve **Success** by providing resources for **Orientation**, strategies for growth and ongoing training for **Advancement**; and fostering engagement, satisfaction and belonging for **Retention**. This program will guide officers to identify organizational priorities, make data-driven decisions and align to develop and achieve strategic and/or operational goals.

SOAR OUTLINE

This outline is intended to provide information and instructions for a successful onboarding process. Here's what is included:

PRE-ONBOARDING

At the beginning of each officer's term, incoming and returning officers receive an email with detailed information about SOAR and access to the Volunteer Training and Onboarding SharePoint, position description, procedure notebook(s) and supplemental documents. This includes critical IT information, including setting up multifactor authentication (MFA).

Questions regarding access to any resources can be directed to the officer's Headquarters staff counterpart.

ORIENTATION

Focusing on acclimation to key Fraternity resources, position roles and responsibilities, Officers are provided information on:

- Overview of Fraternity Structure
- Our Commitment to DEI
- Roles and Responsibilities
- Working with a Team
- Where to Find Resources
- Ongoing Training Opportunities

This information is provided via an orientation module in the Online Learning Center (OLC).

ONBOARDING

Modeled in a 30-60-90-day format and utilizing the position-specific procedure notebook, the onboarding schedule and objectives provide officers with foundational and advanced training to assist with the successful adaptation to new responsibilities, teams and environments.

The following meetings will be scheduled in the first two weeks:

1:1 with Outgoing Officer
This two-hour total session(s) should cover:
- Day-to-day responsibilities and best practices
    - Emails, calls, BetaBase, FAQs, etc.
- Current priorities for the position
- Any unfinished projects or ongoing issues
- Status of the team (if position supervises or supports team members)
- Where to find resources
    - Procedure notebook and task lists
    - Email templates
    - Resource Library documents
    - SharePoint team documents

    Note to Specialists: Specialty Directors will provide onboarding in the event the outgoing Specialist is unavailable.

1:1 with Volunteer Supervisor
This three-hour total session(s) can include any other new officers in similar positions, as applicable, and should cover:
- 30-60-90-day training and check-in schedule
    - Utilizing the procedure notebook
- Pi Phi Structure
    - Review specific to the position
    - Include who does what and who answers which questions (i.e., when to problem solve on your own and when to include others)
- Position description review
- Position expectations
    - Call schedules
    - Email response times
    - Additional expectations
- Goals and priorities
- Beta Buddy introduction and expectations
- Meet the rest of the team (i.e., Regional Team, Specialists, Collegiate Regional Directors, Alumnae Engagement Directors, Specialty Directors, Grand Council)
    - Plan something fun (i.e., virtual happy hour, trivia, games)

**1:1 with Headquarters Counterpart (Applicable at Director Level & Above)
or 1:1 with Specialty Director (Specialists)**
This one-hour total session(s) can include any other new officers in a similar position and should cover:
- Team expectations
- Call schedules
- Goals and priorities for the specialty area
- Pi Phi Structure
  - Review specific to volunteer/staff relationship
  - Include who does what and who answers which questions (i.e., when to problem solve on your own and when to include others)
- How the Headquarters (HQ) counterpart can and will assist
- Meeting may include the Grand Council counterpart, as applicable

  Note to Directors: Your HQ counterpart may attend additional onboarding meetings, depending on your role.

Pi Beta Phi Officer Welcome Webinar
Join all International Officers live on a webinar to kick off the year and receive timely and relevant updates. This webinar is generally held in early August.

Additional Onboarding
Thirty-minute check-ins with your volunteer supervisor at 30, 60 and 90 days will offer more opportunities for additional onboarding, as needed.

ONGOING TRAINING & EDUCATION

Leadership development, education and training will be provided throughout the term through quarterly SOAR Seminars, monthly team calls and Directors Meeting/Officers Workshop. The content focus for ongoing training is derived from outlined SOAR program objectives, Pi Beta Phi's Leadership Model and industry experts.

Quarterly SOAR Seminars
Officers can expect to come together quarterly for:
- Leadership development opportunities
- Intersection and collaboration with other areas of the organization
- Sisterhood opportunities

The following dates have been selected for the 2025-2027 Biennium:
- Wednesday, October 15, 2025
- Wednesday, January 14, 2026
- Wednesday, April 15, 2026
- Officers Workshop
- Wednesday, October 21, 2026
- Wednesday, January 13, 2027
- Wednesday, April 21, 2027

Monthly Team Calls
Monthly calls between Specialists, Directors, Regional Teams, Boards, etc. will continue. A template has been provided for teams to help prioritize discussion topics and allow time for additional training and skill development. This can be found in the <u>Volunteer Training and Onboarding SharePoint</u>.

Directors Meeting/Officers Workshop
These events will allow for additional skill development and training for the invited officers:
- Directors Meeting
  - Special focus on Director and Grand Council (GC) development
  - GC determines priorities and topics
  - Leading a team and feedback conversations
  - Leadership Model
  - Leadership training
  - Roles and responsibilities
- Officers Workshop
  - Specialist-centered to align with the beginning of their terms
  - GC determines priorities and topics
  - Strategic and operational plan work (not updates)
  - Leadership Model
  - Leadership training
  - Higher education trends
  - How to be a good team member
  - Relationship building

FEEDBACK

SOAR emphasizes the value and utilization of feedback, recognizing it as an essential tool for individual growth and program development. Through various feedback mechanisms—including regular surveys, one-on-one meetings and mid-term feedback conversations—officers receive constructive feedback and guidance, helping them identify areas for individual improvement, advocate for development needs and ultimately achieve their goals. Key highlights from officer feedback conversations may be shared during transition conversations to establish continuity in volunteer support.

New officers will be sent surveys at the end of their 30, 60 and 90 days to provide feedback on SOAR and their experience overall. That feedback will be shared with the HQ staff members who manage SOAR programming and volunteer supervisors. Officers appointed mid-term can access the forms on page 8 of this document or in the <u>Volunteer Training and Onboarding SharePoint</u>.

BETA BUDDY MENTOR

A Beta Buddy serves as a mentor to a new officer and offers a helpful perspective as someone who has gone through a similar experience. Every new officer should be assigned a Beta Buddy from their respective team by their volunteer supervisor.

GENERAL EXPECTATIONS OF A BETA BUDDY MENTOR

- Be an informational resource on day-to-day tasks, policies, procedures, etc.
- Help in the socialization process
- Be a resource on Pi Phi culture and norms
- Assist in training the new officer
- Identify resources
- Provide introductions
- Check in regularly to build a relationship, provide advice and answer questions

WHAT A NEW OFFICER EXPECTS FROM A BETA BUDDY MENTOR

- General advice
- Clear information
- Guidance and encouragement
- Positive attitude
- Help in understanding the culture
- Assistance in building networks and how to make them effective and productive
- Establishment of the best form of communication (i.e., email, telephone, in-person)

SCHEDULE EXPECATIONS

- During week one, the Beta Buddy will reach out to the new officer to check in. Communication can be informal (i.e., Teams, email, phone call).
- Bi-weekly touch points for the first month is a best practice. Determine which communication style works best.
- Monthly touch points for three additional months to help ensure successful onboarding is a best practice.

TIPS FOR SERVING AS A BETA BUDDY MENTOR

- You don't need to be an "expert." Your personal experience is important to the new officer.
- Be patient and positive. It takes time to develop a relationship.
- Pace yourself; you will not be able to cover everything at once. Allow enough time for growth and things to sink in.
- Try to build a great relationship.
- Look for a preferred style of communication and/or cultural identification.
- Accept and value differences. The new officer may have a different style from yours.
- Be an active listener and take a non-judgment approach.
- Keep a good attitude and stay in a teaching spirit.

30-60-90-DAY CHECK-INS

At the end of the 30-, 60-, and 90-day marks, new officers are encouraged to submit their responses to the following questions via check-in surveys. New officers should save a copy of their responses and share them with their volunteer supervisor to frame and inform their 30-minute check-in conversations.

30 DAYS | SUBMIT YOUR FEEDBACK

- Tell me what you don't understand about your position now that you've had a month to roll up your sleeves and get your hands dirty.
- Have you faced any surprises since starting in this role?
- What could we have done differently to realistically prepare you for your new role?
- What can the organization do to help you become more successful as you transition further into your role?

60 DAYS | SUBMIT YOUR FEEDBACK

- Do you have enough, too much or too little time to do your work? (3 options)
- Do you have access to the appropriate tools and resources? (Y/N)
- Do you need additional training in any aspects of your position to perform at a high level?
- What can the organization do to help you become more successful as you transition further into your role?
- Do you have a preferred method of delivery when it comes to receiving feedback?

90 DAYS | SUBMIT YOUR FEEDBACK

- Who has been particularly helpful since you started in this role and what have they done specifically?
- Who do you talk to when you have questions about your role? Do you feel comfortable asking? Has anyone gone out of their way to make you feel welcome or included?
- Has it been clearly explained what the organization expects of you? How would you rate leadership communication overall on a scale from 1 to 10, with 10 being highest?
- Do you believe your ideas and suggestions are valued? Can you provide an example of some type of change you've recommended that's been implemented?
- In retrospect, what could we have done differently in terms of setting your overall expectations appropriately for your position?
- How would you grade us in terms of our onboarding program? What suggestions can you share that would make our program stronger?