

The SOAR Guide

Pi Beta Phi's Premier Officer Development Program

Welcome to your new officer role! We're so grateful you said "yes!" to this new opportunity and can't wait to see you SOAR with Pi Beta Phi.

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, 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's 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 site, position description, procedure notebook and supplemental documents needed for position.

ORIENTATION

Focusing on acclimation to key fraternity resources, position roles, and responsibilities, officers are provided training on:

- Overview of Fraternity Structure
- Save the Date for Upcoming Officer Webinars and Topics
- Fraternity Core Values
- Our Commitment to DEI
- DEI Competencies
- Roles and Responsibilities
- Working with a Team
- Building a Foundation of Trust
- Website Overview
- Where to Find Resources

This information is provided via a pre-recorded webinar link included in a welcome email at the start of the term.

ONBOARDING

Modeled in a 30-60-90 format and utilizing the position-specific Procedure Notebook, the onboarding schedule and objectives provide officers with foundational strength and advanced application 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, eReports, FAQs, etc.
- Current priorities for the position
- Any unfinished or ongoing issues
- Where to find resources
 - Procedure Notebook
 - Email templates
 - Resource Library documents
 - OneDrive team documents

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:

- If you currently serve as a Regional Specialist, your volunteer supervisor is the Collegiate Regional Director.
- 30,60,90-day training and check-in schedule
 - Utilizing the Procedure Notebook
 - All new officers will complete the 30, 60 and 90-day check-in forms and forward their responses to their volunteer supervisor. These responses will serve as a starting point for a check-in conversation.
 - All volunteer supervisors will carefully review the responses and schedule individual 30-minute calls with those they supervise to discuss further. Volunteer supervisors should ensure relevant feedback is shared with others who may support new officers, such as the Collegiate Regional Director sharing specialty area-specific feedback with the applicable Specialty Director.
- 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 per the specific role
- Goals and priorities

- Beta Buddy Introduction and Expectations
- Meet the rest of the team (Ex: Other Regional Team, Specialists, CRDs, AEDs, SDs, GC, etc.)
 - Plan something fun! Virtual Happy Hour, trivia, games, etc.

1:1 with Headquarters Counterpart (If Applicable)

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
- This training may include the GC counterpart as applicable

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 Trainings

30-minute check-ins with your volunteer supervisor at 30, 60 and 90 days will offer more opportunities for training as needed.

ONGOING TRAINING & EDUCATION

Leadership development, education, and training will be provided throughout a full 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 Leadership Model and industry experts.

Quarterly SOAR Seminars

Officers can expect to come together quarterly for:

- Leadership development opportunities
- Updates on Pi Beta Phi priorities
- Intersection and collaboration with other areas of the organization
- Sisterhood opportunities

The following dates have been selected for the 2023-2025 Biennium:

- Tuesday, October 10, 2023
- Tuesday, January 9, 2024
- Tuesday, April 9, 2024
- *Officers Workshop in September 2024 will take the place of a SOAR Seminar
- Tuesday, January 7, 2025

- Tuesday, April 8, 2025

Monthly Team Calls

Monthly calls between Specialists, Directors, Regional Teams, Boards, etc. will continue. Templates will be provided for teams to help prioritize discussion topics and allow more time for additional training and skill development.

Team Call Agenda Template:

- Roll Call
 - Who is here and who will need to be caught up?
- Discussion
 - Based on prompts to narrow the breadth of discussion and identify issues that require a team approach
- FYI
 - What is good to know but discussion isn't necessary?
- Skill Development
 - What areas of development would be helpful for the team this month?
- Action Items
 - What will each team member need to do following the meeting?
 - Cascading Communication – What/how will we share with others from this meeting?

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 development
 - GC determines priorities and topics
 - Leading a Team & 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 (Keynote speaker)
 - Higher Ed 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 and one-on-one meetings, officers receive constructive feedback and guidance, helping them identify areas for individual improvement, advocate for development needs, and ultimately achieve their goals.

New Officers will be sent Forms 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 SOAR team and volunteer supervisors.

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 and the expectations will be the same across the board.

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 – e-mail, telephone, in-person

SCHEDULE EXPECTATIONS

- During week #1, the Beta Buddy will reach out to the new officer to check in and see how it's going. Communication can be informal – Teams, email, or phone call.
- Bi-weekly touch points for the first month is a best practice. Determine which communication style works best.
- Monthly touch points for 3 additional months to help ensure successful on-boarding is a best practice.

TIPS FOR THOSE 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 for 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.
- 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 each 30, 60, 90 day mark, new Officers will receive the following questions via a Forms survey. Volunteer Supervisors will receive the responses and could utilize that feedback to frame their 30-minute check-in conversations.

30 DAYS

- What do you like about the position so far?
- What's been going well?
- 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 during the interview/slating process 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

- 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?
- Have you experienced any surprises, disappointments or other "aha" moments in the first two months?
- Do you feel like you've received adequate feedback so far? (Y/N)
- Do you have a preferred method of delivery when it comes to receiving feedback?
- Has your team been supportive of your training and onboarding process?
- After two months in the role, do you feel that you'll need to make a major adaptation to what you originally imagined you'd be doing or a critical change in your focus or expectations to remain successful?

90 DAYS

- 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 his or her 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 give me 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, and what suggestions can you share that would make our program stronger?