

Team Succession Best Practice Guide

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Introduction

The continued growth of a SIFE team depends on the strategies that are put into place to cultivate a sustainable program. Every year, SIFE teams must deal with variable membership numbers that are affected by graduating students and recruiting new team members. The challenge is effectively managing those changes to efficiently begin the new academic year. To approach the transitions that occur, SIFE teams are encouraged to create a team succession plan. The objective of this plan is to transfer important information to help the returning students understand the team's goals, objectives and methods to continue moving the team forward.

Creating a Succession Plan

1. Create a shadowing or mentorship program for new student members and students transitioning into a leadership role.
2. Review the process to become an official faculty advisor and be familiar with the roles and responsibilities and the importance of the faculty advisor.
3. Develop and/or implement yearly transition recording-keeping tools to document the team's history.
4. Participate in SIFE opportunities for training and motivating student members.

Shadowing/Mentorship Program



By creating a shadowing or mentorship program, student members will have an opportunity to learn about SIFE as a global organization and as a student program on campus through the experienced members on the team. This structure can help with training new students and transitioning members into a leadership position.

New Students

Recruiting new students is an important step in sustaining the SIFE program on campus. For more information about recruitment, please refer to the SIFE Student Recruitment Toolkit.

As a new member in the SIFE program, these students will be looking for guidance on the purpose of the SIFE team and the ways to get involved in the program. Learning about the program can be overwhelming, so having a new student paired with a veteran student can help with transferring knowledge and developing relationships on the team.

Although transmitting information about the program is important, building team cohesiveness and making the new students feel connected with the team will also be important in sustaining membership. To improve the team's cohesiveness and build relationships, provide social and team building activities beyond the regular SIFE meetings. The following list provides several fun activities for the team:

- Have a team building retreat (overnight/weekend event) to evaluate current projects and brainstorm new ideas.
- Have a team picnic/informal dinner
- Participate in an adventurous event (i.e., ropes course, rock climbing, adventure race etc.) that drives the team to depend on each other.
- Organize an intramural sports team
- Promote the accomplishments of other team members during team meetings

SIFE Leadership

Becoming a SIFE team leader involves taking on more responsibilities and tasks to help reach the team's goals. Designing a leadership development plan with specific job requirements is important in helping to adapt the new student leaders to the overall operations of the program.

Leadership Structure: The leadership structure can be organized in many different ways and may

include several officer positions and other management roles. The following examples are of leadership structures that a team may utilize:

Officer Positions

Team 1: Basic Structure

President
Vice President
Secretary
Treasurer

Team 2: Function Structure

President
Vice President of Finance
Vice President of Recruiting and Membership
Vice President of Project Development

Team 3: Corporate Structure

Chief Executive Officer (CEO)
Chief Operations Officer (COO)
Chief Financial Officer (CFO)
Secretary

The leadership structure should also include project management positions, which are often called Project Managers. These individuals are responsible for organizing a project team and managing the details required for the completion of a specific project. A well-established structure will avoid over-bureaucracy, foster teamwork and provide valuable project management experience to the team members.

Transitioning New Officers: By creating a shadowing or mentorship program, the team can promote an efficient transition between leadership and get ahead for the next year. The following ideas are opportunities to help better transition the new officers into the next year:

1. Elect the new officers during the previous academic year to allow those individuals to begin shadowing the existing officers.
2. Continue to have the previous officers work with the new officers after the elected term has ended.
3. Create a detailed report of the duties and responsibilities that were associated with the position for the new officers to use as a guide

4. Schedule a meeting for previous and current officers to exchange ideas

As the team progresses, the current leadership structure may need to be changed to adapt to a new direction of the program. Develop clear goals for any member entering into a new position and provide a list of duties and responsibilities.

SIFE has a sample Constitution and Bylaws that outlines important guidelines for operating the team and offers valuable suggestions for team organization and officer position descriptions.

The SIFE Team Advisor

The faculty advisor is a major driving force behind the sustainability of the team. As the student members tend to move on, the faculty advisor is usually the most consistent individual associated with the team. The advisor can be a great mentor and motivator for the SIFE team. Teams that lose a faculty advisor sometimes struggle maintaining the succession of the program on campus; so, being familiar with the roles and responsibilities of a faculty advisor to choose an appropriate candidate and knowing the process to officially register a faculty member with SIFE is important to the success of the team.

To become an official faculty advisor, the interested faculty member must follow these steps:

1. The individual must be employed by the institution.
2. The individual must complete the application on the SIFE website
3. The individual must have a letter sent on the institution's letterhead from an administrator (i.e., dean, department head, or president) to:

SIFE USA Programs Department
1959 East Kerr Street
Springfield, MO 65803

A detailed review of the roles and responsibilities of a faculty advisor can be located in the SIFE Team Handbook on page 50.

Yearly Transition Record-Keeping Tools

An important process your SIFE team can develop and/or implement to help with sustainability and succession is to utilize yearly transition record-keeping tools. These resources will provide a blueprint of a SIFE team. An individual that does not know anything about the SIFE program should be able to easily understand the purpose, goals, objectives, and methods of the team.

Suggested Items to Develop as Yearly Transition Record-Keeping Tools:

1. Team organizational chart (Appendix B)
2. Team Mission, Goals and Objectives
3. Team Constitution (page 5)
4. Team Bylaws (page 7)
5. Tentative calendar of events
6. Sample Agendas*
7. Project Proposal (page 8)
8. Full summaries of ongoing projects*
9. Copy of most recent annual report and competition presentation
10. Tentative dates and deadlines for items due to SIFE HQ
11. Contact information for the entire team*
12. Contact information for BAB members, institutional and funding contacts*
13. Media Contacts*
14. SIFE Program staff contact information
15. Team financial documents*
16. Time Sheet*

* Electronic copies are available online at www.sife.org under SIFE Resources. Most are available in the Team Management Forms; some are incorporated in related best practice guides (i.e. financial documents can be found in the Financial Management Best Practice Guide).

These resources should be updated before the end of each academic year, preferably at the year-end meeting of the SIFE team leaders. These items can remain as hardcopies in the SIFE team office with the faculty advisor or with the incoming team leader or president. The resources will become particularly important if the faculty advisor does not return or the majority of team members graduate.

A notebook is a simple suggestion to create these record-keeping tools; technology is also a great way to organize the team's data with web-based or desktop applications that provide the ability to share calendars and save documents that can be updated by multiple users. The following software products are useful in developing an online approach to organizing the team.

- Microsoft SharePoint
- Google Documents
- Zimbra
- Wikis

SIFE Website Online Tools: The SIFE website offers several tools to help organize the team. These tools can only be accessed by registered SIFE participants. If given access by the faculty advisor, the designated team member(s) will have

the ability help manage these resources, and have access to complete the following tasks:

- Alumni Employment
- Register For Regional Competition
- Apply/Submit Forms/Grants
- Manage Student Accounts
- Merge/Delete Student Records
- Register for Team Events
- Service Leadership
- Student Internship
- Team Data Sheet

Each of these roles that can be assigned to students also has a description, so the faculty advisor can help with clarifying the responsibilities for each of these tasks.

After logging into the website, students may also access the tab called 'My Team' to view the Team Profile and Team Alumni Roster. The designated team member(s) will have the ability to manage the Team and Alumni Roster and export the current alumni and student list to an Excel spreadsheet to help with the management of the team's participants.

SIFE USA Events and Training

During the academic year, SIFE offers several opportunities that can assist SIFE teams with informing and training students about the SIFE program. These events also help to motivate students and understand the overall goal of the SIFE program.

SIFE Team Fall Training Conferences: In the fall semester, SIFE hosts several training conferences around the country to provide teams with an opportunity to learn best practices regarding program development and sustainability and participate in personal development activities. Since this event takes place at the beginning of the academic year, the training conferences are an early opportunity to participate in formal training about the SIFE program, to network with other SIFE teams, to

receive personal development opportunities, and to motivate the team for the year.

SIFE USA Regional Competitions and National Exposition: The SIFE Overall Competition provides SIFE teams with the opportunity to compete against each other and ultimately determine which SIFE team most effectively empowered people in need by applying business and economic concepts and an entrepreneurial approach to improve their quality of life and standard of living. These competitions are another opportunity to motivate the team, especially the new students and officers, for the next academic year. The team will not only have the opportunity to compete, but also network with teams and participate in the career fair. The true passion for the SIFE program is widely expressed at the competitions, and these events are where the term *SIFE'd* originated.

SIFE Team Succession Timeline

Below is a suggested timeline your team could follow to prepare for yearly transitions.

December/January

- Determine next year's leaders
- Hold elections

February/March

- Have previous leadership begin working with current leadership

March/April

- Start transition of leaders' duties to new leadership team

April/May

- Determine next year's carryover projects and ideas for new projects
- Create summer/fall timeline for projects
- Collect returning student information
- Finish and provide transition record-keeping tools to new leaders
- Meet with administration to introduce new leadership team

August

- Determine project leaders

September

- Start implementing projects



CONSTITUTION FOR (NAME OF COLLEGE/ UNIVERSITY) SIFE TEAM

STUDENTS IN FREE ENTERPRISE

- ARTICLE I** **NAME:** The name of this organization shall be (College/University Name) Students In Free Enterprise, herein referred to as SIFE.
- ARTICLE II** **MEMBERSHIP:** All regularly enrolled students of (name of College or University) and other community entities that are interested in the economy of the City of (name of City), the State of (name of State), and the United States. (Insert any other specific eligibility requirements)
- ARTICLE III** **MISSION:** The mission of this organization shall be to provide members the best opportunity to make a difference and develop leadership, teamwork and communication skills through learning, practicing and teaching the principles of free enterprise. (Insert your team’s specific mission statement)
- ARTICLE IV** **EXECUTIVE OFFICER:** Elected executive officers of (College/University) SIFE shall be the president, vice-president, and project manager. Elected officers shall serve for a period of one year, beginning on the first day of fall semester. (Change to reflect your team’s specific organizational structure)
- A. PRESIDENT:** His/her duties shall be to preside over (College/University) SIFE meetings and to vote in case of a tie, to appoint chairpersons of (College/University Name) SIFE committees, and to act as the chief executive of the (College/University) SIFE organization. In case of vacancy in this office, the vice-president shall serve as acting President. (College/University) SIFE will vote for a new President at the next regularly scheduled meeting following the President's resignation.
- B. VICE-PRESIDENT:** His/Her duties shall include performing the duties of the President when the President is unable to; assist committees dealing with policies and procedures of the (College/University) SIFE organization; and, in the case of permanent absence of the President, assume office pending approval of the organization. A vacancy in this office shall be filled by the President, and a new vice-president will be voted on and appointed at the next regularly scheduled meeting.
- C. PROJECT MANAGER:** His/Her duties shall consist of assisting the committees dealing with activities, and planning and coordinating regular and special functions/activities. The President shall fill a vacancy in this office, and a new Activities Coordinator will be voted on and appointed at the next regularly scheduled meeting.
- ARTICLE V** **PROJECT COMMITTEES:** It is hereby established the goals and objectives of the SIFE organization shall be carried forward through committees, which will be organized as deemed necessary. The committees shall be separately defined, established, and deleted as necessary.
- ARTICLE VI** **IMPEACHMENT:** Any officer may be impeached by a petition of fifteen percent of the members, or by a 2/3 vote of voting members present at a regularly scheduled meeting. Definite charges must be brought. A notice of one regularly scheduled meeting must be given to the officer and active voting members.

- ARTICLE VII** **ADVISOR:** Any person employed by the institution is eligible to be the team's advisor. There is no limit regarding the number of advisors.
- ARTICLE VIII** **MEMBERSHIP QUALIFICATIONS:** All active voting members must attend at least 50% of the regularly scheduled functions/activities and be active on at least one committee. Members that do not participate in at least 50% of the functions/activities for a two month period and serve on one committee will be placed on probationary status. To be removed from probationary status, the member must attend 75% of the functions/activities for a two-month period and/or become involved in one committee. If the probationary requirements are not fulfilled at the end of the two-month period, the probationary member will be dropped to non-voting member status. To be reinstated to voting member status, the non-voting member must attend 100% of the functions/activities and/or serve on one committee or for a consecutive period of two months.
(Change according to your team's requirements)
- ARTICLE IX** **FINANCIAL AUDIT:** Financial accounts are to be audited by a disinterested party each year, preferably before the accounts are turned over to the newly elected Secretary/Treasurer.
- ARTICLE X** **AMENDMENTS:** Proposed amendments to this Constitution must be submitted to the (College/University) SIFE President in writing. If approved by 2/3 of the total membership of the organization, a special election shall be held at the next regularly scheduled meeting vote on the proposed amendments. A 3/4 majority vote of those (College/University Name) SIFE members voting in the special elections shall be necessary for the acceptance of the amendments.
- ARTICLE XI** **ADOPTION:** The constitution shall be in full force and effective immediately upon passage by a simple majority of the (College/University Name) SIFE members voting in the special election.

(NAME OF COLLEGE/ UNIVERSITY) SIFE TEAM Bylaws

Article I SIFE (Students In Free Enterprise)

The name of this organization shall be (College/University Name) SIFE team.

Article II Purpose

The purpose of (College/University Name) SIFE is to bring together the top leaders of today and tomorrow to create a better, more sustainable world through the positive power of business.

Article III Membership

Section 1 - Membership is open to all academic majors.

Section 2 - There shall be a faculty advisor, which must be a paid employee of the institution.

Article IV Officers

Office positions shall be president, vice-president, and project managers. These positions shall be filled by election from the (College/University Name) SIFE body.

Article V Duties of Officers

Section 1 - The president shall preside at meetings, shall call executive meetings and shall perform all other duties pertaining to this office.

Section 2 - The vice-president shall preside as president in his or her absence, or at his or her request and shall perform all duties pertaining to this office.

Section 3 - The secretary shall preside over the project committee(s) in his or her absence, or at his or her request and shall perform all duties pertaining to this office.

Article VI Elections

Section 1 - The organization shall hold an annual election of officers in the last week of April.

Section 2 - Nominations shall be taken from the (College/University Name) SIFE body and are elected to office by a majority vote.

Section 3 - New officers are responsible for the duties of the office they hold as outlined in Article V.

Section 4 - Vacancies during the year shall be filled by special election.

Article VII Meetings

At least eight meetings shall be held each term.

Article VIII Parliamentary Procedure

Except when otherwise stated, Robert's Rules of Order, Revised shall be followed at all meetings.

Article IX Amendments

This constitution may be amended by a majority vote of the body as long as at least half of the entire body is present.

SIFE Project Proposal



Proposed Title:	Date:
<hr/>	<hr/>
Submitted By:	Target Date:
<hr/>	<hr/>
Proposal Outline:	
What are the “relevant economic, social and environmental factors?”	
How are people “effectively empowered?”	
Who are “people in need?”	
What is “applying business and economic concepts and an entrepreneurial approach?”	
What is considered “quality of life and standard of living?”	
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Officer Approval:	
<hr/>	<hr/>
Officer 1	Officer 2
<hr/>	<hr/>
Officer 3	Officer 4
<hr/>	<hr/>
Officer 5	Officer 6