



Officer Transition Guide

Office of Fraternity and Sorority Life
University of Dayton





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Purpose

An Effective Officer Transition:

- Maintains seamless continuity of the organization's progress, goals and growth
- Helps to build upon the achievements of the outgoing Executive Board
- Reinforces productive communication between officers and between the Executive Board and the chapter
- Provides an opportunity for incoming officers to plan for the future and establish new goals
- Ensuring that there is a longer transition period of incoming officers to learn from previous officers

Officer Election and Transition Timeline

One month prior to elections: Outgoing officers prepare for transition (October)

Prior to elections: Candidates meet with officers who are in roles that they are considering; candidate should demonstrate that they know the expectations of the role before running (October)

Elections Occur; Installations Occur (November)

One week post election: Retreat is held for incoming officer transition; outgoing/incoming officers hold 1-on-1 meetings; New executive board planning; Individual officer goal setting (December)



Outgoing Officer Guide

Outgoing Officer To Do List

- Organize all notebooks and files
- Finish all necessary correspondence
- Prepare year-end report and evaluation
- Develop action plan and timeline for new officer
- Complete outgoing officer information sheet
- Prepare/update officer handbook (positions they oversee, duties/responsibilities, etc.)

Outgoing Officer Information Sheet

To be completed before transitions

1. The greatest responsibilities to this office are...
2. This position impacts our organization because...
3. The most difficult decision I made was...
4. What I could have done to make the experience better was...
5. Obstacles to performing my job effectively were...
6. Resources that assisted me in handling my job were...
7. Something(s) I tried that did not work were... They did not work because...
8. Things I wish I had known prior to accepting this position were...
9. The most valuable thing(s) I learned about doing this position effectively is/are...
10. Advice I have for the incoming officer is...
11. The problems or areas that require attention within the next year are...
12. Three things that need to be done immediately are...



One-on-One Meeting Guide

One-on-one meetings should be set for one hour and are to review the following pieces of information. Outgoing officers should have this information prepared beforehand. This can be used for all officers in the organization, not just the executive board.

Agenda

- Review responsibilities of the position
- Review timeline for completing duties of the position
- Transition of officer materials to the incoming officer
- Major accomplishments of office over the past year
- Unfinished projects
- Opportunities for improvement
- Goals for the next year
- Important resources and contacts

Timeline of Event

- **4-6 months ahead:** Establish goals and objectives, create a budget, set date, identify venue, get cost estimates for food/beverages/rooms/equipment/etc., create a committee, work with PR to set up a marketing plan, identify any potential speakers/presenters/sponsors/etc.
- **3-4 months ahead:** Start acquiring any donations (items and monetary) from local businesses, set chapter member expectations for event (how much money to raise per member, attendance, deadlines, etc.), work with finance exec position to enable online donation tool/keep track of budget, register event on 1850.
- **2-3 months ahead:** Create marketing materials (profile pictures, cover photos, event flyers, etc.), create Facebook event page.
- **1 week ahead:** Confirm everything, work with school newspaper to get a press release out, have committee go over the event (timeline day of, duties, etc.), purchase any supplies.
- **Day of:** Run point, make sure committee and chapter are doing their part!



Incoming Officer Guide

Your Role as a Leader

1. **Morale builders.** Members must feel confident in you as a leader and they must feel confident that chapter is in a good place to succeed.
2. **Change happens gradually.** Building the confidence in your chapter will allow for changes to happen seamlessly in the future.
3. **Be available.** Help your chapter members when they have questions, concerns, suggestions and ideas to make the chapter better for all.
4. **Be transparent.** Share decisions regarding policies and procedures and be sure to involve members in the decision making process.
5. **Share the glory.** Your chapter succeeds with everyone, not just the executive board.
6. **Have faith in your members.** People live up to your expectations, be they high or low.
7. **Find your purpose.** Each group has a common purpose, find it and share with everyone.
8. **Manage conflict.** Bring issues into the open to have a transparent discussion with all directly involved.
9. **Be mindful.** Structure meetings so that issues of common interest are discussed with the whole group and individual concerns are addressed at other times.
10. **Assume responsibility.** Your position allows for the opportunity to solicit positive change in your chapter, take responsibility for the good and bad that may occur along the way and focus on ways to improve in the future.



Incoming Officer Transition Worksheet

To be completed before transitions

1. What do you perceive to be your organization's objectives or goals?
2. What do you consider to be the responsibilities of your office?
3. Things specific to the position that I want to know about (forms, duties, etc...)
4. Things I should do over Winter break...
5. People I should get to know...
6. Resources and services I need to know about...
7. Things I need to know about working with my advisor...
8. What is my self-care plan?
9. What are my expectations for myself in this position?
10. What expectations do I have for the rest of the executive board?
11. What expectations do I believe others have of me?
12. Other questions that I want answered...



Evaluation and Assessment

Outgoing Executive Council Evaluation

To be completed collectively by the outgoing executive board before transitions; please be prepared to share with the new executive board.

1. Have we developed younger members who will prove to be exceptional and involved?
2. Will the membership be innovative and creative after we have left?
3. What programs or governing practices proved to be successful for us?
4. What was our greatest achievement as an executive council?
5. What was our greatest challenge as an executive council?
6. Three goals we would have liked to accomplish?
7. Three goals we would like our successors to achieve/build on:



Goal Setting Guide

Individual Goal Setting

Considerations:

- Are my goals consistent with my understanding of the purpose of this organization?
- Will the members of my organization agree with my goals? Check.
- Am I being realistic? Can I accomplish my goals during my term as a leader?

Goals I want to accomplish:

1. Projects
 - A.
 - B.
 - C.

Where can I begin?

1. Which goal seems most important to me?
2. Who else in my organization can help me accomplish these goals? Are there outside resources I can utilize?
3. Is there anything I can do tomorrow to help me reach my goals?
4. What can I accomplish next week?
5. What specifically can I do within one month to reach all of my goals?

Collective Goal Setting

1. What is the purpose of this organization?
2. How are we going to fulfill that purpose?
3. What are the initiatives from the previous executive board that will be continued?
4. What would we like to achieve this year?
5. What do we need to prioritize?
6. Action items:



SMART Goals

Specific
Measurable
Achievable
Relevant
Time-Oriented

Specific

What do you want to accomplish?
Why is this goal important?
Who is involved?
What resources or limits are involved?

Measurable

What are the quantity expectations?
What are the quality expectations?
What are the frequency expectations?
What are the cost expectations?

Achievable

What are the knowledge, skills and attitudes needed to achieve the objective?
Are there available resources to achieve the objective? If so what are they?
Are there any time factor or environmental constraints that need to be considered? If so, what are they?

Relevant

Why are you doing this?
Am I the right person to reach this goal?
Does this match our chapter's efforts/needs?

Time-Bound

What can I do six months from now, six weeks and today?
When does it need to be completed?



Guide to Working with Your Advisors

The Role of Your Chapter Advisor

Chapter advisors are volunteer support systems for the organization. Below are some things that they may help with.

1. Act as a **resource person** for the chapter
2. Help chapter to **set and achieve goals**
3. Help chapter to **maintain direction and provide continuity**
4. **Be accessible** to the chapter's needs
5. Support the chapter by attending events and **being involved**
6. Provide **challenge and support** to the chapter

The Role of Your Faculty Advisor

Below is a list of roles that your faculty advisor may take in working with your organization.

1. **Event approval:** Your faculty advisor will approve all of your organization's events in 1850.
2. **Mandatory reporting:** Faculty advisors are mandatory reports at UD. They must report any direct violation of school policy, violations of the health and wellness of the community and anything that they perceive to be a threat to the community.
3. **Problem Solving Agent:** Your faculty advisor can act as a third party that helps your organization work through problems and conflict.