



FRATERNITY AND  
SORORITY AFFAIRS

# OFFICER TRANSITION GUIDE





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Some of the information found in this resource was taken from the Lambda Chi Alpha Retreat Workbook, Sigma Kappa Officer Transition, and the Officer Transition Manual from the University of Kansas' Student Involvement and Leadership Center.



## IMPORTANCE of officer transition

Often times our organizations place little attention or time on officer transition which consequently results in incoming officers spending too much of their attention and time acclimating to their new position. Spending just a little bit of extra time to ensure a smooth officer transition will allow newly elected officers to hit the ground running and significantly improve organizational operations.

Through an effective transition, the incoming officers will be able to learn from the experience of the previous officers and offer continuity and continued growth for the organization.

Believe it or not, an effective transition of your student organization leadership is one of the single most important tasks. It determines the future efficiency and effectiveness and, in turn, its overall ability to maintain high standards of excellence.

### **A smooth transition is:**

- The responsibility of both the outgoing and incoming officer
- A way to help the organization avoid "starting from scratch" each year.
- A transfer of significant knowledge
- A sense of closure for the outgoing officer
- A utilization of the valuable contributions of experienced leaders
- A time for the new leadership to absorb the expertise of the outgoing officers
- A great opportunity for the outgoing officers to evaluate the previous year and help the new officer set goals for the future
- An orientation process for the new officers
- A time for incoming officers to ask questions and the outgoing officers to offer advice
- An outgoing officers chance to say "I wish I would've done this ...."



## TOP TEN TIPS

### for a successful officer transition

- 1. Know your role as an officer.** In order for you to successfully “pass the torch,” it’s important that you know exactly what your duties and responsibilities are. Make sure you read and understand your Officer Manual and/or Operations Guide (if available) when you first take office. Continue to learn as you go through your term and then pass that information along to your predecessor.
- 2. Don’t make assumptions.** Never assume that the person taking your place knows what is expected in his/her new role. Make sure to go over every detail of the office, no matter how small or insignificant you may think it is.
- 3. Build and maintain a notebook for your office.** Having a physical three-ring binder can be crucial when needing to easily access your officer manual or operations Guide. This also provides a perfect place to organize records and other important paperwork. Then, when your term is up, simply pass the notebook along during transition.
- 4. Keep files and make them easily accessible.** Each officer should have either a USB flash drive or portable hard drive to keep and maintain all essential files. These may include budgets, officer reports, event planning checklists, calendars, important contact information, meeting minutes, grade reports, newsletters, etc.
- 5. Set goals and keep track of successes and shortcomings.** Once you set your annual goals, make sure to keep track of your progress. Note if something was completed or if it needs additional work. If you didn’t complete a goal, write down if the goal should be abandoned or carried forward to the next year. Include why you think it didn’t work and how you think it can be accomplished in the future. This information can be very beneficial to a new officer.



- 6. Assess your programs throughout the year.** Conduct surveys following any programs or events your office is in charge of. Find out from the chapter, your advisor(s) and/or university employees what they think. Use this information to suggest changes and/or improvements. This will empower the incoming officer as he makes plans for his term.
- 7. Introduce the incoming officer to your adviser(s).** Make sure the incoming officer is introduced to the student organization Advisor(s) and the UTA Student Org staff if they do not know them already. Provide him with their contact information and help him build a strong connection from the beginning.
- 8. Don't "reinvent the wheel."** Don't start from scratch after each election. If the officer transition process is done correctly and successfully, there should be a seamless transition from one officer to the next. This will save a lot of time and resources for everyone involved and will help improve organization operations immensely.
- 9. Schedule elections to allow time for proper transitioning.** If your chapter has difficulty getting officers back together during the summer or winter break, consider holding elections a few weeks before the academic term ends. This will allow additional time for officers to transition prior to final exams and prior to everyone leaving for the break. It will also give incoming officers more time to prepare for their upcoming terms.
- 10. Make time for officer transition.** Most importantly, you must make time to attend and fully participate in an Officer Transition Retreat. If neither the outgoing or incoming officer makes transition a priority, this becomes an ineffective process. And even after transitioning, it is important for the outgoing officer to continue to stay in contact with and assist the incoming officer as he gets his feet wet. No matter how thorough you think you are during officer transition, there will always be more questions that need answers.



# TRANSITION CHECKLIST

to get the conversation started

## Duties and responsibilities

- What are my officer duties and responsibilities?
- Approximately how much time do I spend with each?

## Officer Manual

- Do I have a copy of the officer manual?
- Were there any sections you found more beneficial?

## Officer Notebook

- Do you have an officer notebook?
- What should be included in it?

## Officer Reports

- Are there any reports that I am responsible for?
- If so, when, by whom, and how do they need to be completed?

## Campus Event Planning Sheet & MavOrgs

- What is the Campus Event Planning Sheet (CEPS)?
- How do you access and complete it?
- When and for what do I need to complete them?
- When and how is MavOrgs utilized?

## Organization Constitution, Student Organization Handbook

- Are there any policies that directly relate to this office?
- Are there any policies that I am responsible for enforcing?
- Campus policies??

## Advisers

- Do I have an adviser? If so, what is the role between the two of us?
- What is my role with the Student Organization Staff?

## Committees

- What committees am I on?
- What committees am I responsible for?
- What do I need to know about these committees?

## Meetings

- What is my role at organization meetings? Officer meeting?
- Am I a member of the Executive Committee? What is my role?



**Officer Goals**

- What were your goals?
- What goals were met and which ones were not? Why?
- Brainstorm and develop new goals. Decide if any previous goals need to be carried forward.

**Budget**

- Can I see a copy of your budget from last term?
- What areas need more or less money?
- Brainstorm and develop a new budget proposal.

**Yearly Calendar**

- When did you schedule your events? When should I?
- Are there any deadlines I should know about? (Mav Orgs Re-Registration; Deadline to book on campus event; profit/loss statements)

**Programs and Events**

- What programs, projects and/or events were effective during the year? Why?
- What programs, projects and/or events were not effective during the year? Why?

**Advice**

- If you had an additional year, what would you do differently?
- What advice do you have for me?

**Additional Questions/Concerns**



# RETREAT PLANNING

## for an effective transition

### **What is an Officer Transition Retreat?**

An Officer Transition Retreat or extended meeting is a necessity before officers turn over. It provides the outgoing officers the opportunity to ensure that the programs, policies, and success of his term do not diminish with the next administration. Furthermore, it provides the incoming officers the opportunity to learn what his responsibilities are and prevents the new officer from having to reinvent the wheel.

An officer Transition should consist of a combination of one or more of the following:

- A meeting with the incoming and outgoing officers (all together)
- A meeting between the incoming and outgoing officers (one on one)
- A retreat during which incoming and outgoing officers meet for one day (or just a morning or afternoon), while the newly-elected officers meet for a second day to brainstorm goals
- An informal information gathering session during which incoming officers gather and record information and knowledge from outgoing officers

Advanced planning is essential for the success of any retreat. A designated chapter officer and/or the alumni adviser should plan the Officer Transition Retreat. The information on the following pages should be utilized to assist in the planning process.



## Officer Preparation

### **Officer Notebooks**

One of the most important aspects to a successful officer transition lies in having a thorough officer notebook. An officer notebook should be a three-ring binder that includes the following:

- Officer manual
- Copy the Organization Constitution
- Officer Operations Guide
- Current chapter and office goals
- Most recent calendar
- Record of programs/events, including planning and execution checklists
- Recommendations based on outcomes of programs/events
- All resources relevant to the office
- List of important contacts

Keep in mind that some of this information and any additional important files and records may be stored on a USB flash drive or portable hard drive.

At the end of each term, each officer should update and revise the information in his notebook and pass it along to the incoming officer. Before the Officer Transition Retreat, all officers should update, revise, and add to their notebook. If the outgoing officer was not provided a notebook from his predecessor, **CREATE A NEW ONE!**



### **Outgoing Officer Questionnaire**

It's never a bad idea for the outgoing officer to spend a few minutes reflecting on the past year in an effort to better prepare the new officer who will follow in his footsteps. Each outgoing officer should answer the following questions and bring to the Officer Transition Retreat:

1. What problems or stumbling blocks did I encounter in my office?
2. How were these problems or stumbling blocks dealt with?
3. What aspect(s) of the term went really well?
4. What recommendations do I have for the incoming officer?
5. What unfinished business must be addressed?

### **Incoming Officer Questionnaire**

It is just as important for the incoming officer to do a little prep work prior to the Officer Transition Retreat. This will help him think about his upcoming role and help him figure out what additional information he needs to learn during the retreat. Each incoming officer should answer the following questions and bring to the Officer Transition Retreat:

1. What is the purpose of my office?
2. What are my responsibilities?
3. How can I improve what the former officer accomplished?
4. What new/old programs do I plan to utilize during my term?
5. What are three preliminary goals I would like to accomplish? What action items must I complete to reach these goals?
6. What do I feel will be the greatest challenges of this office? How can I overcome them?



## Needs Assessment

The student organization should first perform a needs assessment that will help evaluate its current operations. This should include strengths, area(s) for improvement and future opportunities. These areas can be identified by one or more of the following:

- Organization member assessments
- On-Campus Advisor assessment
- Post Event Assessment

\*\*A sample assessment can be found on page 15 of this document.

After determining from these assessments how the student organization is currently operating, the retreat planner should develop a program that addresses these needs.

Example: The retreat planner decides to utilize the Adviser assessment. After meeting with him/her, the retreat planner discovers from the assessment and conversation that the chapter's recruitment programming is suffering. From this, the retreat planner decides to devote some time during the officer transition retreat for the officers to evaluate old recruitment practices and determine new recruitment goals for the incoming officers.

Some topics that may be discussed include:

- How can the recruitment chair better educate the organization on best recruitment practices?
- How can the organization work to increase member participation during recruitment events?
- How can the organization create programs that promote better retention of new members?

These topics could be discussed as a group and then each incoming/outgoing officer pair could discuss these further during their one on one conversations and establish goals for the next year that revolve around those issues.



## Retreat Time

When will the retreat occur?

- Before the term begins
- First Weekend of school
- After elections
- Other

Time constraints of the retreat

- One hour
- Afternoon
- One day
- Weekend
- Other

Remember, the retreat should always be scheduled far enough in advance to avoid scheduling conflicts. When the retreat occurs and the timeframe should be determined based on what needs will be addressed during the retreat and how effectively incoming/outgoing officer pairs are handling their own transition meetings.

Example: Because the outgoing/incoming officer pairs generally do not initiate their own transition processes and because most officers plan to leave campus after their finals, the retreat planner felt it best to hold an Officer Transition Retreat immediately after elections and prior to the semester ending. Since all aspects of officer transition would need to be covered and because extra time was needed to discuss recruitment, the planner opted for the retreat to be held on a Saturday and last the duration of the day.



**Retreat Activities/Workshops**

With assessments complete, focus areas determined and the length of the retreat decided, a true plan can now be set in motion. Remember that any activities during the retreat should incorporate the focus areas. Keep in mind the following when choosing appropriate activities and/or workshops:

- Time
- Meals
- Breaks
- Location
- Small/Large Group Discussions
- Facilitator(s)
- Cost
- A/V Needs
- Materials Needed

The retreat planner can choose activities and workshops provided through other chapter resources or may choose to create his own. Your Adviser and/or Student Organization office are also good resources for ideas. Keep in mind that because this is an Officer Transition retreat, focus should not shift too far from that purpose.

<u>Focus Area</u>	Example:	<u>Workshop/Activity</u>
Fixing Recruitment Issues		Group Discussion
Goal Setting		Goal Setting Workshop
Transitioning		One on One Discussions



### Action Plan

After determining the workshops and activities for the retreat, it's now important to cover the details. This includes formulating times, material needs, facilitators, etc.

It is important to note that if outside facilitators are needed, the dates and times of the retreat may be effected to accommodate their needs.

Example:

Workshop/Activity: Group Discussion (Fixing Recruitment Issues)

Central Idea: To evaluate past recruitment practices to determine where the chapter is failing and how it can improve through actions by all officers.

When: 10 am to noon

Who: Outgoing Recruitment Chair

A/V Needs: Projector (to display assessment results)

Materials Needed: Flip charts, markers

Workshop/Activity: Goal Setting Workshop

Central Idea: To educate officers on proper goal setting techniques prior to one on one discussions between incoming/outgoing officer pairs.

When: 1 pm to 2 pm

Who: Adviser

A/V Needs: Projector/Power Point

Materials Needed: Goal Setting workbooks, pencils/pens

Workshop/Activity: One on One Discussions (Transitioning)

Central Idea: To provide ample time to incoming/outgoing officer pairs to go over and discuss Officer Transition Checklist.

When: 2:30 to 5 pm

Who: Incoming/Outgoing officer pairs. President will provide intro to activity.

A/V Needs: None

Materials Needed: Officer Transition Checklists, pencils/pens, officer notebooks, etc.



**Sample Assessment**

In order to help your chapter/colony better plan an effective Officer Transition retreat, it is beneficial to ask one or more stake holders to assess current operations. The following assessment survey can be utilized to obtain opinions from your campus Adviser or your undergraduate membership.

Dear ...,

Our chapter is currently planning a retreat. In an effort to assess what programs, workshops and activities to hold at the retreat, I am asking for your opinion on the current state of our operations. Please complete the following assessment survey and return it to the chapter president as soon as possible. Thank you for your time.

List the STRENGTHS you feel the organization possesses. Please explain why.

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List the WEAKNESSES of the organization. Please explain why.

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What specific chapter PROGRAMMING CONCERNS to you have?

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What specific chapter RETREAT WORKSHOPS would you recommend?

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### Retreat Teambuilding Activities

#### **Living Our Organizational Values**

“For our closing activity, I would like you to put away your phones, computers and notebooks and sit in a circle.”

- *Have group make space to sit in a circle on the floor without any distractions. Sit in the circle with the group holding the cup or bowl.*
- “As I pass this bowl around, I want each of you to pull out a slip of paper. The slip of paper will have one of the four organization values on it. Think about one specific way you will demonstrate that value in your office this year.”
- *Allow each member to pick a slip of paper and explain how she will demonstrate that value in their role. For example, the organization president may discuss personal growth through developing their leadership skills.*
- “One of the tools available to help keep our values at the center of your time in office is to utilize an officer reflection journal. This journal should also be shared at the next officer transition retreat with the incoming officer”
- To assure each officer is utilizing the reflection journal, the organization president may assign a topic every two weeks to reflect what’s going on in the chapter.

#### **Energizer**

“For this activity, we want to demonstrate how important it will be to work together during the transition process. Everyone should sit on the floor in a circle with their legs extended in the middle.” *Place the ball, balloon or can on someone’s foot.*

- “Without letting the [ball/balloon/can] fall on the floor, the goal is to get it all the way around the circle as efficiently as possible, much like transitioning from one group of officers to the next. You may only use your feet in this activity, not your hands. If the [ball/balloon/can] falls, you’ll have to start over from the beginning. Feel free to talk and come up with a strategy if that helps you.”
- *Tell the first person to start, and monitor to see if the object falls. If it does, make sure they start over. If they finish within five minutes, have them try it again to see if they can beat their previous time.*
- *Lead a brief discussion using the following questions:*
- How might this activity simulate leadership transition?
- In what ways did you have to work with each other to achieve your goal? How does that relate to teamwork as an officer?
- If you were towards the end of the circle, how did it feel to wait for your turn?
- If you were in the beginning of the circle, how did it feel to complete your turn but still wait for others to finish? Did you help them by explaining what you did? Did you encourage the rest of the group? Did you just sit back and watch? Did you stop paying attention?
- How does this tie back to the organization?



## THE BRIDGE BUILDER

by William Allen Dromgoole

An old man going a lone highway,  
Came, at the evening cold and gray,  
To a chasm vast and deep and wide.  
Through which was flowing a sullen tide  
The old man crossed in the twilight dim,  
The sullen stream had no fear for him;  
But he turned when safe on the other side  
And built a bridge to span the tide.

"Old man," said a fellow pilgrim near,  
"You are wasting your strength with building here;  
Your journey will end with the ending day,  
You never again will pass this way;  
You've crossed the chasm, deep and wide,  
Why build this bridge at evening tide?"

The builder lifted his old gray head;  
"Good friend, in the path I have come," he said,  
"There followed after me to-day  
A youth whose feet must pass this way.  
This chasm that has been as naught to me  
To that fair-haired youth may a pitfall be;  
He, too, must cross in the twilight dim;  
Good friend, I am building this bridge for him!"