



**OFFICE OF THE DEAN OF STUDENTS
FRATERNITY & SORORITY LIFE**

Risk Management Guidelines: As risk management and legal liability are two of the most pressing issues in the Greek world today, a thorough discussion of each should be included in an officer transition program. Consult the Office of Fraternity & Sorority Life for additional resource materials.

University Policies & Information: Each new officer should become familiar with the rules and regulations that affect their chapter. In particular, chapters should review:

- Fraternal Organization Agreement (FOA)
- How To Reserve Space on Grounds
- Event Security Policies and Expectations
- Contact Information for the Office of the Dean of Students/ Fraternity & Sorority Life

Governing Council Information: Each new officer should become familiar with the constitution and bylaws of the governing council (IFC, ISC, MGC, NPHC) as well as gather the contact information for the officers of each council.

Financial Records: In addition to bank statements and a financial transaction history, a current and projected budget should be shared during the transition process. A complete set of financial records must be transferred between executive committees.

Inter/National Headquarters Information: All officers should be provided with information about their inter/national organization. This should include paperwork deadlines for the national organization as well as key contacts.

Contact Information: Officer information will need to be updated on various levels. For example, it is important to ensure that the appropriate officer is listed as the contact for mail, the chapter website, the chapter bank account, etc.

Additionally, a master list of key contacts should be compiled and shared among officers. Key contacts should include:

- Chapter Advisor
- Office of Fraternity & Sorority Life
- Inter/National Headquarters
- Housing Corporation
- Police, Fire, Safety
- University Offices (Newcomb Hall, IM Sports, etc.)
- Other people who can support officers

Officer Transition Retreat FAQs

When should the transition retreat be held?

After elections and definitely before the new officers are installed.

Where should the transition retreat be held?

It is recommended that an effective transition take place away from the chapter house. Holding the transition workshop on-Grounds or at a retreat center will ensure that distractions will be minimal. It will be important to arrange for an environment that is both comfortable and welcoming to help facilitate a creative and focused atmosphere.

How long should the transition retreat last?

A transition can be ongoing if the old officers are around to answer questions. However, for the length of time in the meeting, the officers should plan on spending an entire day.

Officer Transition Retreat: A Sample Program Outline

The following is a sample retreat outline that can be modified and adapted to meet your chapter's needs. The overall retreat will occur in three distinct parts:

- Part 1 will provide an opportunity for outgoing and incoming officers to meet to discuss specific officer related roles and responsibilities.
- Part 2 will focus on a discussion on the past executive board's term in office
- Part 3 will be a strategic planning session for the incoming executive board.

Please contact the Office of the Dean of Students/Fraternity & Sorority Life with any questions or assistance in planning such a program.

Introduction

15 Minutes

The lead facilitator(s) (president or chapter advisor) will begin by welcoming the officers to the transition retreat. The lead facilitator (LF) will review the key objectives for the training retreat:

- Officers will review the duties and responsibilities of the individual officers and the Executive Committee as a whole.
- Officers will review the past officer's term to discuss areas of success and challenge.
- Officers will discuss the current state of the chapter, as well as the long term vision and goals for the chapter.
- Incoming officers will set goals and a calendar for their term in office.

Part 1

1 - 2 hours

The first part of the officer transition retreat will provide an opportunity for incoming and outgoing officers to meet and to discuss specific officer information. Officer notebooks as well as essential materials should be transferred during this time.

It is critical that outgoing officers be provided with an opportunity to impart their wisdom to the incoming officers. In allowing officers to "say goodbye" it provides for closure and allows all involved to reflect on their experience. Additionally, this eases the transition process and keeps outgoing officers engaged as active members.

There are several questions that should be discussed between officers. Prior to the retreat, the LF can create a handout which provides such discussion prompting questions:

- What was the outgoing officer's transition like when they took office?
- What information did the outgoing officer wish s/he knew when they took office?
- How could the outgoing officer have been better prepared?
- Where did the officer succeed in their position?
- What were the greatest mistakes and lessons learned during the officer's term in office?
- What paperwork is required of the specific officer?
- What supplies are necessary for the officer to succeed in his/her position?
- What items/programs/projects are still outstanding?
- What role did the outgoing officer play on the greater executive committee?
- What key relationships did the officer build? Which relationships need to still be built?

Part 2**1 hour**

The second part of the officer transition retreat will provide an opportunity for the outgoing executive board to share information about their term in office. In particular, this portion of the officer transition program will focus on how the executive board functioned as a team.

In addition to addressing any specific questions posed by the incoming executive board, the LF should be prepared to ask specific prompting questions that can include the following:

- What are the current issues facing the executive board?
- What projects or goals have not been fulfilled? What is the status of these projects or goals and what are next steps for fulfilling?
- How did the executive board function as a team? What specific best practices or approaches allowed the executive board to function in a high-performing way?
- How did the executive board support other executive board members?
- How did executive board members hold one another accountable to the organization's standards and goals?

At the conclusion of this session the outgoing executive board should be directed that they should leave the transition retreat. Prior to doing so, it is highly recommended that outgoing officers are recognized for their service and work. In addition to expressing thanks and gratitude, the LF may consider incorporating an activity to provide closure. For example, the LF can lead a "gavel pass" where the executive board members can share final words of wisdom to the incoming officers.

Part 3**2 hours**

The final part of the officer transition program will focus on the incoming executive board. In particular, this portion of the program will focus on goal-setting for the executive board as well as setting a calendar for the upcoming semester.

The following program plan can be implemented by the LF to lead the group in a goal setting session:

The LF begins by asking the group their definition of goals and why goal setting is important to chapter operations.

LF should gear conversation towards how goals provide direction, describe success, provide challenge, create common tasks and purposes, create expectations, etc. Goals help us focus our efforts. They are a specific statement of what is most important. They allow you to break down big plans into manageable tasks that keep you from being overwhelmed.

Facilitator introduces the idea that goals should be SMART:

S: Specific - Specific goals state exactly what you want to accomplish.

M: Measurable - Measurable goals state what you want and when you want it. They enable your progress at any point along the way.

A: Action-Oriented - Action Oriented goals indicate how they will be achieved. They specify what you need to do to reach your goals

R: Realistic - Realistic goals are possible. They are attainable, considering the resources and constraints relative to the situation.

T: Timely - Timely goals allow reasonable time to achieve them, but not so much that you lose focus or motivation.

LF then instructs the group to think in their minds that it is the end of the semester and poses the following questions – What do they hope has happened in their chapter? Allow for students approximately 1 minute of silent reflection or to take notes on what they hope has happened. Ask students to list and explain the things they want to be able to say the executive board and chapter has achieved.

LF writes each idea on the individual sheets/dry erase board. Each participant should be sharing multiple accomplishments or achievements. Facilitator should work to try and keep similar ideas together.

After participants have shared, facilitator should instruct the group to decide on their top 3 goals/most important areas of focus for the coming year.

Once the group has decided on their top 3 goals, the facilitator should provide the designated recorder with the Goal Setting Sheets. The facilitator should explain that the worksheet is intended to allow the chapter to establish specific goals and objectives for their respective chapters.

The group should work through the Goal Setting Sheets, completing 1 sheet per goal. The facilitator should work in keeping the group on task in responding to the posed questions. The group should respond to all questions.

Upon completion, the chapter should keep the original copy of the Goal Setting Sheets. Copies should be made and shared with the organization's advisor, Inter/National Headquarters, and the Office of the Dean of Students/Fraternity & Sorority Life.

References:

The following resources were enlisted and consulted in creating this Officer Transition Guide:

- *Officer Transition Guide*, North American Interfraternity Conference
- *Transitioning Old & New Officers*, Association of Fraternity Advisors/Karyn Nishimura Sneath, Npower
- *President's Manual*, Georgia Tech

CHAPTER PLAN OF ACTION

ISSUE TO ADDRESS: _____

BRAINSTORM ALL POSSIBLE WAYS TO ADDRESS THE ISSUE:

GOAL STATEMENT:

In addressing this issue, what do you hope to accomplish?

PLAN OF ACTION

Steps	Specific Action	Who?	Date to Be Completed By:
<input type="checkbox"/>	_____	_____	_____
<input type="checkbox"/>	_____	_____	_____
<input type="checkbox"/>	_____	_____	_____
<input type="checkbox"/>	_____	_____	_____
<input type="checkbox"/>	_____	_____	_____