

OFFICER TRANSITION MANUAL

Adapted from:
The Association of Fraternity Advisors, Inc. & Phi Delta Theta Transition Retreat

Who: Outgoing and incoming officers should be in attendance.

When: Hold your transition time between elections and the beginning of the new semester. To allow for the appropriate amount of time to cover all the transition discussions a Sunday may be a good day.

Where: Try to plan the transition at a location where there is few distractions (i.e. reserve a room on campus).

Why: To allow new officers the opportunity to learn the duties of their specific officer position as well as come together as a new governing body. Transition meetings also provide an opportunity for officers to discuss what worked and what didn't work throughout the year and ways to improve.

Officer Binders

Before the transition meeting each outgoing officer should update their officer binder with new information/forms as well as remove any outdated information. These binders should be updated and passed down year to year.

What to keep:

Organizations mission

Constitution/by laws

Description of the specific position and all other positions

Resource/contact list

Goals

Important handouts

Financial reports (treasurer)

Status of any pending projects (President)

Evaluation of past projects

Previous minutes/handouts (President and Secretary)

University policies (i.e. hazing, risk management, eligibility, etc.)

Officer Transition Surveys (Outgoing and Incoming Officers)

Officer Transition Agenda

Opening: Begin by discussing as a group why transitions are important. Transition meetings provide an opportunity for officers to discuss what worked and what didn't work throughout the year and ways to improve. Discuss the importance of the officer binders and how they will be used to support the incoming officers.

Ice Breaker: This may be beneficial if many of the incoming and outgoing officers do not know each other very well.

SWOT Analysis: Strengths, Weaknesses, Opportunities, and Threats (see complete analysis below) This should be completed as an executive board.

Officer Surveys: Use this time for individuals to complete surveys if needed. Outgoing and incoming officers should complete their survey prior to the transition meeting. The surveys will be helpful during the actual transition to provide topics of discussions. Surveys should be added to your officer binder.

Transition Time: This will be the time when outgoing officers will meet with the incoming officer and go through the transition binder. Incoming and outgoing officers should review their surveys.

Break: If possible provide food/drinks at the meeting.

Organization Goal Setting: Discuss SMART goals which are specific, measurable, attainable, realistic, and timely, i.e. events, GPA, community service, and campus involvement (see details below). This will be the time that everyone will meet together as an executive board.

Officer Goal Setting: Just like goal setting for the organization, each officer should create goals for their specific position. It may be helpful to look at the organizations overall goals and create goals on how you specifically can help achieve those goals. This should then be added to your officer binder.

Budget: As an executive board discuss a preliminary budget for the year.

Officer Expectations: This is the point that all expectations are set for all officers such as attendance at meetings and events.

Questions/Comments/Reflections: Open the floor for anything else officers would like to discuss.

Closing: Make sure to thank everyone for taking the time to meet!

SWOT Questions

STRENGTHS: Define what you excel in...

What does the organization do well?

How strong is the organization on campus?

Does the organization have a clear strategic vision?

Does the organizations culture produce a positive environment?

WEAKNESSES: Evaluate your liabilities...

What could be improved within the organization?

What does the organization do poorly?

What should be avoided?

Does your organization struggle with financial management and debt?

OPPORTUNITIES: Evaluate the members, student body, and campus...

What favorable circumstances are you facing?

What are the interesting trends? Is your organization capable of taking on these trends?

Is your organization recruiting new types of students?

THREATS: Assess potential obstacles...

What obstacles do you face?

What policies and laws are being implemented that may affect the organization?

SMART Goals

Specific – Goals should be specific as possible and never general. Consider who, what, where, why, when, and which when developing a goal.

Measurable- You should be able to measure the progress of your goal (i.e. how will you know the organization accomplished its goal?) Being able to measure a goal helps the organization stay on track and reach target dates of completion.

Attainable- You should be able to answer yes to the following question: “Is the goal challenging but still capable of being accomplished?”. Ultimately you want your goals to be achievable.

Realistic- The goal should be one the organization is willing and able to accomplish.

Timely- Goals should have a time frame so that there can be a target date set to accomplish the goal. Target dates brings about a sense of urgency and motivates individuals to work towards completing goals on time.

Possible Discussion Questions

What are your responsibilities...

What went well....

What should continue to be implemented....

What do you like most about your position....

What resources helped...

What goals did you achieve....If you did not achieve a goal what was the reason....

What could be improved (by the position, org, others)...

Problems that occurred this year....

Obstacles you encountered in the position....

Daily, weekly, monthly, yearly tasks....

Outgoing Officer Survey

List three things during your term in office that were considered most important?

1. _____
2. _____
3. _____

List three things you wish you had done while in your position?

1. _____
2. _____
3. _____

List three important pieces of advice that you would like to give to your incoming officer?

1. _____
2. _____
3. _____

List any outstanding items that still need completion.

Incoming Officer Survey

List three things that made you want to run for this position and why.

1. _____

2. _____

3. _____

List three new ideas that you would like to implement for your position and/or organization this year.

1. _____
2. _____
3. _____

List three important foreseeable problems for your position this year.

1. _____
2. _____
3. _____

List possible solutions for the three problems listed above.

Goal Setting Worksheet

Short Term Goal # 1: _____

Actions taken to complete goal:

1. _____
2. _____
3. _____

Projected Date of Completion: _____

Short Term Goal # 2: _____

Actions taken to complete goal:

1. _____
2. _____
3. _____

Projected Date of Completion: _____

Short Term Goal # 3: _____

Actions taken to complete goal:

1. _____
2. _____
3. _____

Projected Date of Completion: _____

Short Term Goal #4: _____

Actions taken to complete goal:

1. _____
2. _____
3. _____

Projected Date of Completion: _____

Long Term Goal # 1: _____

Actions taken to complete goal:

1. _____
2. _____
3. _____

Projected Date of Completion: _____

Long Term Goal # 2: _____

Actions taken to complete goal:

1. _____
2. _____
3. _____

Projected Date of Completion: _____

Resources

The Association of Fraternity Advisors, Inc.

<https://greeklife.tamu.edu/sites/greeklife.tamu.edu/files/Officer%20Transition%20Guide.pdf>

Phi Delta Theta Transition Retreat

http://www.phideltatheta.org/documents/officer-toolbox/manuals/m-transitions_retreat.pdf