



DELTA TAU DELTA

Officer Transitions



Officer Training

Internal Operations
2018 - 2019

To Whom It May Concern:

Our Chapter, Epsilon Iota-B, places a large emphasis on the importance of officer transitions. The foundation for an exceptional year is based on the officers of the chapter. However, a frail turnover can easily prevent the successful operations of the chapter. Therefore, we have created a timeline of events for our officer transition process along with a checklist ensuring that all sequences in the process are covered. The dates for this timeline are shown below:

- November 4th, 2018:** Officer Nominations
- November 11th, 2018:** Officer Elections (#1-3)
- November 11th - December 15th, 2018:** Officer Transition Meetings
- November 18th, 2018:** Officer Elections (#6-11)
- November 25th, 2018:** Strategic Officer Planning Meeting
- November 25th, 2018:** Formal Turnover
- December 15th, 2018:** End of Fall 2018 semester
- February 14th - 18th, 2019:** Northern Division Conference
- March 9th, 2019:** Officer Training
- March 31st, 2019:** Start of Spring 2019 semester

Through this process, we are able to maximize the effectiveness and better prepare the newly elected officers. The details of these events are described below.

FAAR Criteria

600 Level

- ❖ The chapter organizes a strategic planning meeting for all chapter officers and shows proof of utilizing officer manuals found on the DeltRoad.org website
- ❖ The chapter should include an agenda for the meeting, including a date, expected goals and an attendance sheet. Additionally, the chapter should include a description of how the resources on DeltRoad.org were used.

800 Level

- ❖ In addition to the 600 level requirement, the chapter utilizes an external facilitator for a full day officer training and goal setting retreat
- ❖ In addition to items submitted for the previous levels, the chapter should verify the retreat by submitting the following:
 - Name of facilitator(s)
 - Date of program along with start/end time
 - An outline of topics discussed (a bullet point outline is sufficient, please do not submit PowerPoint slides).
 - Names of brothers in attendance



1000 Level

- ❖ In addition to the 800 level requirement, the chapter utilizes an external facilitator for a full day officer training and goal setting retreat prior to at least two academic terms
 - ❖ In addition to items submitted for the previous levels, the chapter should verify the retreats for each term by submitting the following:
 - Name of facilitator(s)
 - Date of program along with start/end time for each term
 - An outline of topics discussed (a bullet point outline is sufficient, please do not submit PowerPoint slides).
 - Names of brothers in attendance
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Contributions

Elective Officers

2017-2018

Chairman:

Jacob Danaj, *President*

Members:

Nicholas Operti, *Administrative Vice-President*

Ryan Reuben, *Executive Vice-President*

Kristofer Slintak, *Treasurer*

Joshua Tanke, *Administrator*

David Fletcher, *Guide*

Ryan Croos-Dabrera, *Sergeant-at-Arms*

Shane Combs, *Director of Recruitment*

Jordan Maxgay, *Director of Academic Affairs*

Alex Craven, *GMT Vice-President*

Joshua Ora, *Director of Risk Management*

Eric Serrano, *Assistant Treasurer*

Dayton Hang, *New Member Educator*

Elected Officers

2018-2019

Chairman:

Thisara Wijesundera, *President*

Members:

David Fletcher, *Vice-President*

Eric Serrano, *Treasurer*

Anthony McKenzie, *Administrator*

Bradley Winchester, *Director of Risk Management*

Dayton Hang, *Director of The Road*

Zachary Walls, *Guide*

Alex Craven, *Sergeant-at-Arms*

Caleb Forrest, *Director of Recruitment*

Adam Migliore, *Director of Academic Affairs*

Michael Bavaro, *GMT Vice-President*

Andrew Palovich, *Assistant Treasurer*

Nicholas Rebar, *New Member Educator*

Logan Thomas, *New Member Educator*

Programming



November 4th, 2018

Title: Officer Nominations

Presenter: Jacob Danaj, *President*

Attendance: All Active Members

Agenda:

- I. Nominations of President
- II. Nominations of Vice-President
- III. Nominations of Treasurer
- IV. Nominations of Director of The Road
- V. Nominations of Guide
- VI. Nominations of Director of Recruitment
- VII. Nominations of Sergeant-at-Arms
- VIII. Nominations of Director of Academic Affairs
- IX. Nominations of GMT Vice-President
- X. Nominations of Assistant Treasurer
- XI. Nominations of New Member Educator

Brief Description: This is the 1st meeting of the election process where we conduct all officer nominations.

November 11th, 2018

Title: Officer Elections #1

Presenter: Jacob Danaj, *President*

Attendance: All Active Members

Agenda:

- I. Elections of President
- II. Elections of Vice-President
- III. Elections of Treasurer
- IV. Elections of Director of The Road

Brief Description: This is the 2nd meeting of the election process where we conduct the first group of elections.



November 18th, 2018

Title: Officer Elections #2

Presenter: Jacob Danaj, *President*

Attendance: All Active Members

Agenda:

- I. Elections of Guide
- II. Elections of Director of Recruitment
- III. Elections of Sergeant-at-Arms
- IV. Elections of Director of Academic Affairs
- V. Elections of GMT Vice-President
- VI. Elections of Assistant Treasurer
- VII. Elections of New Member Educator

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Brief Description: This is the 3rd meeting of the election process where we conduct the second group of elections.

November 11th - December 15th, 2018

Title: Officer Transition Meetings

Presenter: Nathan Ply, *Chapter Adviser*

Attendance: Executive Board (2017-2018) and Executive Board (2018-2019)

Obligation Orientation: Active Involvement

FAAR: 600

Agenda:

- I. Responsibilities of the position, with a job description
- II. A timetable for completion of annual duties
- III. Unfinished projects
- IV. Important contacts and resource persons
- V. Mistakes that could have been avoided
- VI. Advice for the new officer
- VII. Any questions the new officer may have
- VIII. Where the outgoing officer can be reached with future questions

Brief Description: After the first officer position is elected, the transition process will begin. The incoming officer will not meet with the current officer until that officer has thoroughly read and reviewed the Officer Manual for the position. Through this process, the incoming officer is given great insight and is able to understand the fundamentals of the position. Based on a survey, we were able to record that 91% (10/11) of incoming officers felt reading the manual beforehand was much more effective than having just a turnover meeting. Shown above is the agenda for each individual officer turnover meeting. We utilize the turnover checklist on deltroad.org as a template for the meeting, and then include items that pertain more to our chapter. Below is a list of each officer turnover date.

- President – November 21st



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- Vice President – November 20th
 - Treasurer – November 21st
 - Administrator – November 30th
 - Director of The Road– November 24th
 - Guide – November 30th
 - Sergeant-at-Arms - November 30th
 - Director of Risk Management – November 21st
 - Director of Recruitment- November 29th
 - Director of Academic Affairs - November 29th
 - GMT Vice-President - November 30th
 - Assistant Treasurer - November 22nd
 - New Member Educator - November 24th

Once each officer has conducted their individual turnover meetings, they will fill out the Officer Transition guide found on DeltRoad.org. This document will be submitted to the Vice-President with the hard deadline of Officer Training. A sample of the Officer Transition guide is shown below.

Purpose

The purpose of this document is to ensure that the duties of President are passed on and understood by the reader. Your job as President not only includes being the face of the chapter, but it is also to be the internal and external mediator of all situations. What you say and how it's conveyed are 'law' because you are the leader. This document is meant to be living and should be added to with your lessons learned so that future Presidents can benefit from your wisdom.

Timeline

- **Immediately Following Election of all positions (Mid Fall term)**
 - Gain access to Presidents email
 - Walk through Omega Fi vault
 - Transition all positions on Omega Fi
 - Forward email sent by Kath Sargent
 - Go through responsibilities of President
 - Create a vision for your Presidency
 - The goals that you make for the Fraternity should be reflected by the goals by the people under you
 - Ex) Your goals is Raise \$5K for JDRC during the year.
The AVP goal should be "Get philanthropy chair to plan x number of events to meet this goal" etc...
 - Make a planning calendar shared only to E Board
 - Collect goals from all E Board members
 - Make sure those E Board members with committee's also collect goals from their committee members
 - Your job is to keep us open for business



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- Open action items
 - Make sure everything for semi-formal is planned
 - Make sure rooming points are compiled and ready to go before Room Scam on Reading day.
 - Collect goals from E board for the winter work term
 - These goals should build up to what you want to accomplish in the Fall
 - They should be FAAR centered like getting rooms reserved or setting up time for speakers to come in
 - Important End of Term dates
 - Last chapter is senior send off
 - Monday before reading day is Senior Dinner, and Roast
 - The date for senior dinner should have already been given to the cook before elections, but make sure to check with the cook to confirm
 - Invite the academic advisor to the Senior dinner and introduce yourself
 - House Turnover
 - Make sure that people are not leaving without their rooms being cleaned.
 - Only sign the sign out sheet when the last person has left the room. They are accountable to distribute the fines to their roommates
 - Take pictures of the sheet you sign with A-section. They have changed agreed upon sheets before.
 - Make sure there is no trash in the parking spot next to the dumpster. Emphasize to A section that it's unacceptable to have trash spilling over into that spot
 - **Winter Work Term**
 - Responsibilities
 - Keep up to date on goals you have received
 - Meet with E Board once a month if necessary
 - Usually an email update is all that is needed, but it's good to communicate with everyone about open action items
 - Have a Board and Advisors meeting (A Board Chair, R Board Chair, and E Board chair(you)) once a month
 - Useful for everyone to update you on how their committees are going and if they are having problems how you all can work together to address them
 - Great to make sure your vision for the Fraternity is going smoothly
 - Schedule a Winter planning retreat
 - Half way into work term if possible
 - Officer training should happen at this retreat
 - An example retreat agenda is in the President's drive
 - Officer training should be handled by the Director of the Road
 - Northern Division Conference



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- Should have budgeted for the max amount of people to attend
 - Book hotel room before the end of January
 - There is a discounted rate for the conference. Make sure you book at the discounted rate. Link should be sent by Nationals, but can also be found on Delts.org
 - Cheyenne's To-Do List
 - Cheyenne will send out a list of items that need to be gathered
 - Current alumni advisor contact info:
 - Nathan Ply
 - (810) 247 0161
 - nate.ply.9518@gmail.com
 - Collect information needed for the Greek Roster xlsx sheet Cheyenne provides
 - Have the admin provide you with an official calendar with official nonparty events
 - Certificate of Liability & Risk Management Programs (Current MRG) can be obtained by the Director of Risk Response and Education via email
 - Found at: <https://www.delts.org/meet-our-people>
 - Practice lines for Ritual

Lessons Learned

- **Zachary Walls (Fall 2016 – Fall 2017)**
 - **Jacob Danaj (Fall 2017 – Fall 2018)**
 - **Thisara Wijesundera (Fall 2018 – Fall 2019)**
 - The people around you have the same goals as you. Don't turn them into your enemies.
 - Your attitude and positivity affects the chapter. If you don't believe in what you're doing then nobody will.
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November 25th, 2018

Title: Strategic Officer Planning Meeting

Presenter: Nathan Ply, *Chapter Adviser*

Attendance: Executive Board (2017-2018) and Executive Board (2018-2019)

Obligation Orientation: Active Involvement

FAAR: 600

Agenda:

5 mins - Welcome and Introductions

120 mins - The Year in Review

25 mins - Goals for the previous year

1. What did we hope to accomplish?
2. How well did we do on each goal?
3. What goals should be continued this year?
4. What goals need to be changed?
5. What goals are no longer feasible?

15 mins - Programs and Activities

1. How effective were the programs / activities we sponsored? How did we measure their effectiveness?
2. Did we have a good balance in our schedule of programs and activities?
3. Were our programs and activities consistent with our goals?
4. What activities and programs do we want to repeat?
5. How well did we perform on the FAAR? Did we meet our goals? Do we feel like that is a true reflection of the chapter?

20 mins - Membership

1. Do we have too many, too few, or just the right amount of members?
2. What actions did we take to recruit members?
3. Were our recruitment efforts successful?
4. Are our members as actively involved as we want them to be?
5. What were the opportunities for members to get involved in a meaningful way?

20 mins - Officers and Organizational Structure

1. Are officer roles and responsibilities clearly described? How?
2. Did officers work as a team, or is there more teamwork needed? If so, what contributed to that dynamic?
3. Is the time and effort required in each position comparable?
4. Is there a two-way communication between officers and members?
5. How do the members feel about the officers?

20 mins - Organizational Operations

1. Were the finances adequate for our group and managed properly?
2. Were meetings run effectively? Was their frequency adequate?
3. Did the committee structure work?
4. Did we have scheduling conflicts with other groups or activities?

10 mins - Advisor Involvement

1. Did our advisor provide the support we needed?



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2. Did we give our advisors and other faculty or other volunteers a chance to get involved?
 3. How could we improve advisor and alumni involvement?

10 mins - Public Image

1. How do we see ourselves? Is this how “outsiders” see us?
2. How can we enhance our image?

Brief Description: The purpose of this meeting was to properly prepare the newly elected officers for success as an Executive Board so that the chapter will continue to benefit and progress in living out the values of Delta Tau Delta. Each officer, after being elected in the weeks prior, was tasked with reviewing their respective Officer Manuals. They were given a physical copy in which they could make notes and comments in, and a digital copy for simple access. At this meeting, the incoming and outgoing President followed the agenda to brief the new Executive Board on the basics of how to operate. We also meticulously reviewed the long term goals of the house, goal tracking procedures, successful items, failed items, key points to success, and many other processes.

March 9th, 2019

Title: Officer Training

Presenter: Nathan Ply, *Chapter Adviser*

Attendance: All Active Members

Obligation Orientation: Active Involvement

FAAR: 1000

Agenda:

5 mins - Welcome and Introductions

75 mins - Officer Training

30 mins - Officer Introduction and Information

1. Resources are provided to each of the incoming officers and reviewed
2. Incoming and outgoing officers review resources
3. Incoming and outgoing officers review responsibilities and expectations

45 mins - Advisor Involvement

1. Assessment of understanding for each officer responsibilities and expectations
2. Advisor discussion is facilitated between incoming and outgoing officers about adjustments to the position(s) for our chapter, concerns, questions, and improvement opportunities for each officer

Fraternally,
Thisara Wijesundera
President
Epsilon Iota B