# **[POSITION]**

# **OFFICER TRANSITION GUIDE TEMPLATE**

# Congratulations on being elected as the next [position] for the Delta Upsilon chapter at [school]. This transition guide is intended to be a resource for your Executive Board role.

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   6. Instructions on how to navigate LegFi, OmegaFi or any other application used by the chapter and/or institution (if applicable)
   7. Delta Upsilon website

LETTER FROM THE OUTGOING OFFICER

This letter is intended to welcome the newly elected officer to the role, and the outgoing officer should be sure to include the following components:

Congratulations

Words of wisdom

Encouragement

Key supporters and general tips for role

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Dear \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_,

Congratulations on being elected to serve as the next [position] for the Delta Upsilon Chapter at [college]!

…

Wishing you all the best,

[Name of outgoing officer]

OVERVIEW OF RESPONSIBILITIES

FORMAL RESPONSIBILITIES

## In accordance with the formal position description of the [position], Delta Upsilon Fraternity charges the [position] with (include position responsibilities from Delta Upsilon International Fraternity By-laws: Article III, Section 2):

* [Responsibility #1]
* [Responsibility #2]
* [Responsibility #3]
* [Responsibility #4]
* [Responsibility #5]

CHAPTER RESPONSIBILITIES

## Beyond the high-level responsibilities of the role of [position], as a member of the chapter’s Executive Board, you are directly responsible for a variety of the chapter’s functions. In accordance with the Constitution & By-laws of the [chapter name] of Delta Upsilon, the [position] is charged with:

* [Responsibility #1]
* [Responsibility #2]
* [Responsibility #3]
* [Responsibility #4]
* [Responsibility #5]

CHAIRMAN AND/OR COMMITTEES

## While you’re responsible for components of the chapter’s operations, you’re also tasked with managing chairmen and/or committee roles who assist in the completion of your responsibilities. These chairmen and/or committees include:

* [Chairman &/or committee #1]
* [Chairman &/or committee #2]
* [Chairman &/or committee #3]
* [Chairman &/or committee #4]
* [Chairman &/or committee #5]

CEP REQUIREMENTS

## Each member of the Executive Board is tasked with submitting items for Chapter Excellence Plan (CEP) completion. CEP submissions allow for a chapter to report components of the chapter’s operations that are meaningful to the membership experience. The chapter’s CEP submissions are reflected in the chapter’s annual Men of Merit performance. Please look to the Delta Upsilon website for additional [CEP information.](https://www.deltau.org/chapter-excellence-plan)

* [CEP #1]
* [CEP #2]
* [CEP #3]
* [CEP #4]
* [CEP #5]
* [CEP #6]
* [CEP #7]
* [CEP #8]
* [CEP #9]
* [CEP #10]

MEN OF MERIT IMPLICATIONS

In your Executive Board role, please note which [Men of Merit Standards](https://www.deltau.org/men-of-merit) you be able to influence because of your duties and responsibilities. This list should include a description regarding how your effectiveness contributes to the Men of Merit performance. Please share the strategies employed to contribute to a standard.

* [Men of Merit Standard]- Explanation on the position’s contribution to performance (below, minimum, expectation, aspirational)
* [Men of Merit Standard]- Explanation on the position’s contribution on performance (below, minimum, expectation, aspirational)
* [Men of Merit Standard]- Explanation on the position’s contribution on performance (below, minimum, expectation, aspirational)
* [Men of Merit Standard]- Explanation on the position’s contribution on performance (below, minimum, expectation, aspirational)

POSITION TIMELINE

ANNUAL TIMELINE

## The following timeline has been developed to provide a more detailed account of the [name of positions] responsibilities throughout a term.

NOVEMBER

* [Responsibility #1]
* [Responsibility #2]
* [Responsibility #3]

DECEMBER

* [Responsibility #1]
* [Responsibility #2]
* [Responsibility #3]

JANUARY

* [Responsibility #1]
* [Responsibility #2]
* [Responsibility #3]

FEBRUARY

* [Responsibility #1]
* [Responsibility #2]
* [Responsibility #3]

MARCH

* [Responsibility #1]
* [Responsibility #2]
* [Responsibility #3]

APRIL

* [Responsibility #1]
* [Responsibility #2]
* [Responsibility #3]

MAY

* [Responsibility #1]
* [Responsibility #2]
* [Responsibility #3]

JUNE

* [Responsibility #1]
* [Responsibility #2]
* [Responsibility #3]

JULY

* [Responsibility #1]
* [Responsibility #2]
* [Responsibility #3]

AUGUST

* [Responsibility #1]
* [Responsibility #2]
* [Responsibility #3]

SEPTEMBER

* [Responsibility #1]
* [Responsibility #2]
* [Responsibility #3]

OCTOBER

* [Responsibility #1]
* [Responsibility #2]
* [Responsibility #3]

KEY DEADLINES

## The following are key deadlines for your position for the coming academic year. Adhering to the below deadlines ensure the chapter maintains good/active status with the institution and International Fraternity Headquarters.

* [Deadline #1]
* [Deadline #2]
* [Deadline #3]
* [Deadline #4]
* [Deadline #5]
* [Deadline #6]
* [Deadline #7]
* [Deadline #8]
* [Deadline #9]
* [Deadline #10]

RELEVANT CONTACTS

To best execute the responsibilities of the role, there are resources that are afforded to you. Please utilize the individuals below as support throughout your term:

ALUMNI ADVISOR:

* [Name]
* [Email]
* [Phone Number]

UNIVERSITY FRATERNITY/SORORITY LIFE COORDINATOR/ADVISOR:

* [Name]
* [Email]
* [Phone Number]

IHQ CHAPTER LIAISON:

* [Name]
* [Email]
* [Phone Number]

FORMER [POSITION]:

* [Prior academic year]:
  + [Name]
  + [Email]
  + [Phone Number]
* [2 years prior]:
  + [Name]
  + [Email]
  + [Phone Number]

VALUABLE DOCUMENTS

To complete a transition packet/document, please include any governing documents that are essential to an officer executing his responsibilities within the realm of appropriateness. Examples of documents to include:

1. Delta Upsilon Constitution & By-laws
2. Chapter By-laws, addendums, house rules, etc.
3. Contact information for incoming & outgoing officers
4. Position budget (if applicable)