



**DELTA TAU DELTA**

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**OFFICER TRANSITION  
GUIDE**



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## DEAR DELTA TAU DELTA OFFICER

Too often, chapter leaders dedicate themselves to successfully leading their groups for an academic year and at the end of their terms, leave the positions without time spent making sure the incoming officers have the opportunity to be trained. When that happens, all the information regarding the previous year's lessons learned are not passed on to the incoming officers, thus slowing down their progress. Without taking the time to effectively transition incoming officers, chapters lose the opportunity to continue momentum gained in the previous year. Time that could be used moving the organizations forward and accomplishing new goals is spent catching up.

The National Association of Campus Activities defines effective transition as:

"Effective leadership transition is the process by which past and future student leaders in an organization work together to review and learn from previous events and programs and prepare for the upcoming year. This process can occur in one or several days and may be accomplished in a formal or informal setting. The transition process an organization chooses to use during this time period truly depends on the needs and resources available to the group." – "8 Tips for Effective Student Leader Transition", Campus Activities Programming, May 2009

This packet is designed to help all officers and chapter leaders have the tools to successfully transition outgoing and incoming officers. The forms in this packet are meant to empower members to have intentional conversations with one another to minimize the effects of turnover within the chapter, increase chapters' success, and continue momentum accomplished by leaders during the previous year.

The Delta Tau Delta Officer Transition Guide is designed to be used in sections:

- o Outgoing Officer/Executive Board Transition
- o New Board Transition/Future Goal Setting

The forms in the packet are designed to be used individually as well as part of the greater packet – we encourage you to tailor it to fit the needs of your local chapter.

We hope you utilize this packet to navigate a successful transition. Please contact Central Office at any time for help along the way!

# OUTGOING OFFICER GUIDE

## OUTGOING OFFICER TO DO LIST

In addition to gathering information for the new board members, the outgoing officer should tie up any loose ends in their position. Please check this list to ensure all necessary items have been completed.

1. Make sure space is reserved for all annual events that your position is responsible for planning and hosting and get a copy of these reservations to give to the incoming officer.
3. Organize all notebooks and files, both hard copy and electronic.
4. Finish all necessary correspondence (letters, e-mail, phone calls) and pass along contact information for the new officer.
5. Prepare year-end report and evaluation if applicable.
6. Develop action plan and time-line for new officer transition, including but not limited to:
  - a. Necessary meetings attended and conducted by officer
  - b. Important tasks
  - c. Sharing tasks and duties with other group members
  - d. Introductions to key people / relationship building
  - e. One-on-one meetings and trainings
  - f. Financial Information (if applicable).
  - g. Leadership training
7. Complete Outgoing officer information sheet(s) – part of this packet.
8. Plan and/or attend a retreat for outgoing and incoming officers.
9. Make sure all contracts, bills, invoices, and any other outstanding financial commitments have been properly completed and processed and all necessary payments have been made. If any of these are in process at the time of transition, write a memo to the new officer noting what is complete/what needs to be done with them.
10. Make sure to tell the new President that they need to re-register the student organization for the upcoming academic year on your local campus.
11. Allow incoming officers to shadow outgoing officers from the time they are elected until they take office.

# PREPARING BINDERS/FILES/NOTEBOOKS

## OFFICER HANDBOOK

To properly transition, outgoing officers should keep the following documents throughout the year and organize them in a binder or electronic folder to hand off or share with the new officer.

## SUGGESTIONS FOR WHAT TO INCLUDE:

### Items Related to the Organization:

1. Organizational Mission Statement
2. Organizational Constitution and By-Laws
3. Organizational Policies and Procedures
4. Governing Organization Constitution and By-Laws (IFC, FIPG guidelines, local campus social policy).
5. Officer job descriptions
6. Budget information
7. Year-end reports and evaluations
8. Organizational Calendar
9. Organizational Goals
10. Specific Officer / Position goals
11. Agendas and Meeting Minutes
12. Committee Reports

### Items Related to the University:

1. University policies and handbook
3. Judicial Policies - organizational and University

### Additional Helpful Resources:

1. Important names and numbers (contact list)
2. Pertinent correspondence (emails, letters, etc.)
3. Resource list
4. Important forms (both printed and electronic)
5. Organizational goals - both met and unmet
6. Name and contact information of outgoing/incoming officers
7. Unfinished project information
8. Do's and Don'ts, helpful hints and lessons learned

# OUTGOING OFFICER WORKSHEET

[To be completed by the outgoing officer before transition meetings and training sessions]

Position Title: \_\_\_\_\_

Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Email Address: \_\_\_\_\_ Date: \_\_\_\_\_

Directions: Please think through and respond to the following questions regarding your responsibilities; this information will be helpful to your successor. Lessons learned from this reflection can be shared with incoming officers verbally or in written format.

The responsibilities of my position included:

List other officers with whom you worked and the projects involved:

List what you enjoyed most and least regarding your position:

Who was the most helpful in getting things done? Who were good resources? List other aids that helped complete your job:

Things you wish you had known before you took the position include:

List specific accomplishments realized during your term in office and the reasons for their success. What did you try that worked well and would suggest doing again? Why?

List any problems or disappointments you encountered as a part of your position and suggest ways of avoiding or correcting them. What did you try that did not work? Why did it not work? What problems or areas will require attention within the next year?

What could you have done to make this a better experience?

List supplemental materials and sources of information you found most helpful. Include specific alumni or faculty contacts, university / college officers, community resources, etc.

Create a timetable/list important dates related to your position. Provide suggestions for increasing efficiency and effectiveness.

What should be done immediately during the summer? In the fall?

List any other suggestions you feel would be helpful to your successor in carrying out the responsibilities of this office.

## OUTGOING OFFICERS MAJOR ACCOMPLISHMENTS

Accomplishments	Barriers/Limitations	Resources	Solutions	Still To Be Done



# EVALUATION AND ASSESSMENT

## Officer / Chair Evaluation

This evaluation is to be used by the organization leader to provide constructive feedback to student group officers / chairs to alert them to areas in which they're strong and to areas in which they need to improve.

Name of Student to be Evaluated: \_\_\_\_\_

Period of Evaluation: \_\_\_\_\_ through \_\_\_\_\_

Evaluator: (Name) \_\_\_\_\_ (Title) \_\_\_\_\_

O = Outstanding | V = Very Good | G = Good | A = Adequate | P = Poor | NA = Not Applicable

I think the Officer / Chair:

Shows a sense of direction regarding his/her job and knows what he/she should be doing.

O    V    G    A    P    NA

Has the ability to obtain and analyze facts and apply sound judgment.

O    V    G    A    P    NA

Is effective when organizing his / her work.

O    V    G    A    P    NA

Displays enthusiasm about his / her job.

O    V    G    A    P    NA

Shows a willingness to do more than asked.

O    V    G    A    P    NA

Communicates well with students.

O    V    G    A    P    NA

Communicates well with staff.

O    V    G    A    P    NA

Provides creative ideas and valuable suggestions.

O    V    G    A    P    NA

Follows through on the responsibilities assumed.

O    V    G    A    P    NA

Is on time for meetings, etc.

O    V    G    A    P    NA

Motivates students to work effectively.

O V G A P NA

Provides a good example of leadership for others.

O V G A P NA

Is objective in decision making.

O V G A P NA

Produces high quality work.

O V G A P NA

Displays a sense of professionalism.

O V G A P NA

Demonstrates overall effectiveness as an officer / chair.

O V G A P NA

This officer's / chair's strengths include:

- 1.
- 2.
- 3.

This officer's / chair's areas for improvement include:

- 1.
- 2.
- 3.

Overall rating of this officer / chair:

Outstanding/ Very Good /Good / Adequate / Poor

Additional comments regarding the performance of the officer / chair and / or general suggestions:

Adapted from: Old Dominion University's Organization Transition Guide (2008-2009)

## OUTGOING EXECUTIVE BOARD EVALUATION

This document is to be used by the outgoing board at a final board meeting to assess the entire group's process throughout the year. This document should be completed by the outgoing president and executive board and provided to the incoming president.

Have we developed new members who will prove to be exceptional and involved?

What programs or governing practices proved successful for us?

What was our greatest achievement as an executive board?

What was our greatest challenge as an executive board?

Three goals we would have liked to accomplish:

# OFFICER TRANSITION MEETING OUTLINE

Before the newly-elected officers of your chapter officially assume their responsibilities, it is wise for the old and new officers to get together for a transition meeting. Such a transition meeting provides continuity and continued growth for the organization while allowing the new officers to learn from the experiences of the outgoing officers. A casual, open atmosphere should be encouraged so the organization can benefit from an honest evaluation of the accomplishments and issues of the previous year. The following outline can help make the transition meeting flow as smoothly as possible.

## I. WELCOME AND INTRODUCTIONS

(Help participants get acquainted and explain the purpose of the meeting)

### II. The Year in Review

#### A. Goals: Review the group's goals for the previous year.

What did we hope to accomplish?

How well did we do on each goal?

What goals should be continued this year?

What goals need to be changed?

What goals are no longer feasible?

#### B. Programs and Activities: Evaluate what your group did.

How effective were the programs / activities we sponsored? How did we measure their effectiveness?

Did we have a good balance in our schedule of programs and activities?

Were our programs and activities consistent with our goals?

What activities and programs do we want to repeat?

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?

#### C. Membership: Evaluate number of members and their commitment.

Do we have too many, too few, or just the right amount of members?

What actions did we take to recruit members?

Were our recruitment efforts successful?

Are our members as actively involved as we want them to be?

What were the opportunities for members to get involved in a meaningful way?

#### D. Officers and Organizational Structure: Evaluate officers and structure.

Are officer roles and responsibilities clearly described? How?

Did officers work as a team, or is there more teamwork needed? If so, what contributed to that dynamic?

Is the time and effort required in each position comparable?

Is there two-way communication between officers and members?

How do the members feel about the officers?

#### E. Organizational Operations: Evaluate finances, communication, etc.

Were the finances adequate for our group and managed properly?

Were meetings run effectively? Was their frequency adequate?

Did the committee structure work?

Did we have scheduling conflicts with other groups or activities?

F. Advisor Involvement: Evaluate both quality and quantity.

Did our advisor provide the support we needed?

Did we give our advisors and other faculty or other volunteers a chance to get involved?

How could we improve advisor and alumni involvement?

G. Public Image: Evaluate how other groups perceive you.

How do we see ourselves? Is this how “outsiders” see us?

How can we enhance our image?

### III. YOUR LEGACY TO THE NEW OFFICER TEAM

A. What are the current strengths and weaknesses of the group?

B. What is the best advice you can give your successor?

C. What were there major challenges and accomplishments in your term?

### IV. OFFICER TRANSITION

(Have the new and outgoing officers meet individually to discuss)

A. Responsibilities of the position, with a job description

B. A timetable for completion of annual duties

C. Unfinished projects

D. Important contacts and resource persons

E. Mistakes that could have been avoided

F. Advice for the new officer

G. Any questions the new officer may have

H. Where the outgoing officer can be reached with future questions

### V. WRAP-UP

A. “Pass the gavel” in a semi-official ceremony in front of outgoing and incoming board and wish everyone luck!

B. Provide an opportunity for informal socializing.



# INCOMING OFFICER GUIDE

(personalize for your campus)

Contact Information for Frequently Used Campus Departments and Organizations

Campus Health and Wellness Center

Campus Building, Suite 114

Web: <http://www.website.edu>

Email: [email@email.edu](mailto:email@email.edu)

Phone: 555-555-5555

Academic Advising

Housing & Residence Life

IT Help Desk

University Marketing

Campus Life

Multi Cultural Center

Office of Community Service & Involvement

Student Conduct

Student Activities Center

VP of Student Affairs:

# OVERVIEW OF YOUR ROLE AS A CHAPTER LEADER

Keeping these guidelines in mind will help you succeed and be respected by your peers!

1. Work on the morale of your group members. Unless they feel good about their roles, your group members will not be as cooperative and productive as they could be.
2. Expect any changes to be accepted gradually. Sometimes we expect people to accept changes overnight that we have been thinking about for months. Remember that it is almost impossible to change people... they usually must change themselves.
3. Be available to help those who want your help. When we attempt to force our ideas of assistance when it hasn't been solicited, we risk building resistance among our group.
4. Let your group members determine the group's purpose. Unless group members have a say in what is to happen, their participation will be half-hearted at best.
5. Emphasize the process for working through problems rather than the final result. Your desired results may change as your group changes. An open channel of communication that involves all group members will help you incorporate these changes.
6. Approach change through cooperative appraisal. When change is based on evidence, it reduces the chances for a win-lose situation. The decision will be based on what is right, rather than who is right.
7. Encourage brainstorming and creativity. Provide feedback and support for new ideas, and avoid penalizing for mistakes made for the sake of experimentation.
8. Share decision-making regarding policies and procedures. By emphasizing how to solve problems, and involving your members in these decisions, you will create deeper commitment in your members.
9. Recognize criticism as the first step individuals take in assuming responsibility. Use criticism as a chance to solicit suggestions for improvement.
10. Share the glory. You cannot expect enthusiastic participation if you take all the credit.
11. Have faith and confidence in the ability of your group. People tend to live up to our expectations, be they high or low.
12. Be sure your group has a common purpose. Structure meetings so that issues of common interest are discussed with the whole group, and individual concerns are addressed at other times.
13. Trust the motives of all group members. Attend to every suggestion as a sincere one that deserves a sincere response.
14. Don't set yourself up as infallible. Be honest and admit when you lack an answer. Don't be afraid to be human.
15. Be specific. Communicate exactly what you expect and think.
16. Be socially sensitive. Avoid being witty or funny at the expense of group members.
17. Use the inquiry method. Use questions to get information and define issues.
18. Be impartial. Play no favorites, and give all group members equal chance to participate.
19. Promote group cohesiveness. Make all group members feel as if they belong.
20. Manage conflict, don't ignore it. Bring conflict into the open, and concentrate on issues, behaviors, and facts rather than personalities.

Adapted from: Student Organizations' Handbook - The Wichita State University (1992-1993)

## INCOMING OFFICER'S TRANSITION WORKSHEET

The new officer can ask these questions to the outgoing officer to gain a solid understanding of the position.

Things specific to the position I want to know about (forms, duties, etc...)

Things I should do over the summer...

People (positions) that I should get to know...

Services that I need to know about...

Things I need to know about working with my advisor...

### OTHER QUESTIONS I WANT ANSWERED...

What do you consider to be the responsibilities of your position?

What expectations do you have of the executive board?

What expectations do you believe your members have of you?

What problems or areas will require attention within the next year?

What should be done immediately upon taking over the position?

I have discussed the forms in the Officer Transition Guide with and given/explained all materials (including electronic forms) to the incoming officer.

\_\_\_\_\_  
(Outgoing Officer Signature)                      (Date)

I have discussed the forms in the Officer Transition Guide as well as all materials (including electronic forms) the outgoing officer has shared with me.

\_\_\_\_\_  
(Incoming Officer Signature)                      (Date)

# PERSONAL GOAL SETTING FOR YOUR POSITION

Before you begin goal setting with the members of your organization, you may benefit personally by developing your own goals. The goals may vary in terms of being long or short in range. Some things you may want to think about for yourself might be: the tone you would like to create in your organization, programming ideas, personal growth, the people you will be working with, budgeting, leadership training, etc.

Begin your personal goal setting now by brainstorming what you would like to see happen during the upcoming year.

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Now, list things you can do right away:

Things I want to do starting right now!!! (Be specific - how, when, where...)

- 1.
- 2.
- 3.

Things I want to get started on soon: (when?)

- 1.
- 2.
- 3.

Things the outgoing officer indicated I should do right away:

- 1.
- 2.
- 3.

How do I get started? Is there anything I can do before tomorrow? What specifically?



What can I realistically have accomplished one-week from today? One-month?

## GOAL SETTING GUIDE – FURTHER CONSIDERATIONS...

### CONSIDERATIONS:

Are my goals consistent with my understanding of the purpose of the group?

Will the members of my chapter agree with my goals? Check with them.

Am I being realistic? Can I accomplish my goals during my tenure as a leader?

Goals I want to Accomplish During my Term:

1. Projects-

A.

B.

C.

2. Process or manner in which we go about projects (i.e., involving people in decisions, having more members participate in meetings, having more interesting meetings, etc.)

A.

B.

C.

Where Can I Begin?

What goal seems most important to me?

Do I have the skills necessary to accomplish my goal? Who else in my chapter can help me? Are there outside resources and people who might help?

Is there anything I can do before tomorrow to help me reach my goal?

What can I accomplish next week?

What specifically can I do within one month to reach all my goals?

# INCOMING OFFICERS - GOALS, DREAMS, AND PRIORITIES OF THE BOARD

Things We Would Like to Accomplish	Barriers/Limitations	Resources	Unknown Questions	Why We Want This

## WORKING WITH YOUR ADVISOR

What is your advisor supposed to be doing? Your advisor can be a valuable resource if you know what to expect and how to communicate with him or her. Below is a list of roles that your advisor may take in working with your organization.

1. Problem Solving Agent: Your advisor may be the impartial third party that helps you work through problems and conflict.
2. Counselor: You may find that your advisor is the type of person you can go to with your personal concerns.
3. Information Resource Person: Use his/her experience and expertise!
4. Idea Resource Person: Use your advisor to help discover new ideas when your creative juices dry up.
5. Sounding Board: If you want to try out a new idea on an impartial party before proposing it to the entire group, try it out on your advisor.
6. Administration Liaison: Rely on your advisor for advice on who outside of the chapter could be helpful on projects or for leading programs.
7. Interpreter of University Policies and Procedures: Rely on your advisor's expertise.
8. Analyzer of the Group Process: Use your advisor as an observer if things in your organization seem to be stuck.
9. Role Model: A positive one, of course!
10. Attendee / Participant at Events: Be sure to keep your advisor informed so that he/she can at least make an appearance to show support.
12. Continuity Provider: Since the advisor is there from year to year as the chapter members change, he/she can provide a sense of the group's history.
13. Conflict Resolution Assistant: Use your advisor as an impartial mediator.
14. Empowerer of Students: Your advisor should be a valuable resource who helps your organization reach good decisions.

Adapted from: The Wichita State University's Student Organizations' Handbook (1992-1993)

## ADVISEE / ADVISOR RELATIONSHIPS

1. The responsibility for building the relationship must be shared between advisor and student.
  - View this relationship as a partnership.
2. The relationship must be based upon open, direct communication.
  - Share needs, responsibilities, and expectations with each other.
  - Be prepared to negotiate.
3. Both must recognize the other's various roles and responsibilities in / outside of their position.
  - Know each other's commitments and let each other know their impact.
4. Both advisor / student are human beings who make mistakes, follow their own value systems, and work in individual, professional, person styles.
  - Accept, discuss, and learn from mistakes - then move on.
5. Both advisor / student are continually growing, changing, and learning: each within their own unique stages of development. Challenge and support each other.

Gwost, M.A. (1982). Effective student and advisor relationships. Programming Magazine, Dec.