

THE DELTA CHI FRATERNITY OFFICER TRANSITION AND TRAINING

Officer transition and training is crucial to the continued success of any chapter and is the responsibility of both incoming and outgoing officers. The most effective way to facilitate this changeover is in a retreat setting, attended by as many alumni advisors as possible, old and new executive committees, and any other chapter advisors. This retreat is *not* to set goals for the chapter, but to tailor the efforts of the new officers to the goals the chapter has already established. To plan an effective retreat, consult the *Chapter Retreat BRIEF*, which will explain the process step by step. In addition to an agenda and the *Chapter Retreat BRIEF*, the following checklist will be helpful in facilitating an effective officer transition. All other recommended reading can be found in the Chapter Operations Manual.

"A"

Prior to the Election:

1. Attend at least two executive committee meetings
2. Attend at least one ABT meeting
3. Attend at least one IFC meeting
4. Review the *Chapter Operations Manual* and especially the officer's responsibility checklist (found in the *Chapter Operations Manual* and the *Cornerstone*)
5. Meet with current "A" to discuss responsibilities, problems, hints, etc.

Prior to Taking the Oath of Office:

1. Read the following publications:
 - a. *Chapter Management BRIEF*
 - b. Delta Chi Law
 - c. Chapter by-laws
 - d. "You've Won the Election!" (found in the *Chapter Operations Manual*)
 - e. Chapter "A"'s Reference Sheet
 - f. *How to Win Friends and Influence People* by Dale Carnegie
2. Review officer notebook with past "A"
3. Review parliamentary procedure (found in the *Chapter Operations Manual* and *Cornerstone*)
4. Contact alumni and advisors ("BB", ABT president, Faculty Advisor, and any other key alumni) in regards to officer transition/training facilitation
5. Review past semester's chapter meeting minutes
6. Review chapter risk management policies and FIPG guidelines
7. Meet with Greek Advisor and IFC president
8. Review past Visitation Reports
9. Send letter of introduction to sorority presidents, other fraternity presidents, neighbors, etc.

"B"

Prior to the Election:

1. Attend at least two executive committee meetings
2. Review the "B"'s responsibilities checklist
3. Meet with current "B" to discuss responsibilities, problems, hints, etc.
4. Sit in on one of the current "B"'s meetings with the committee chairmen

Prior to Taking the Oath of Office:

1. Read the following publications:
 - a. *Committee System and Chapter Management BRIEFs*
 - b. Delta Chi Law
 - c. Chapter by-laws
 - d. "You've Won The Election"
 - e. *How to Win Friends and Influence People* by Dale Carnegie
2. Review officer notebook with past "B"
3. Review parliamentary procedure
4. Appoint and meet with incoming committee chairmen to start developing a plan of action for the term/year in accordance to those goals set by the chapter at retreat (see *Committee System BRIEF*). These then need to be presented at the transition/training retreat.
5. Review the chapter's risk management policies and the FIPG guidelines
6. Review the past Visitation Reports
7. Make sure committee chairmen are keeping notebooks

"C"

Prior to the Election:

1. Attend at least one executive committee meeting
2. Read the "C"'s responsibility checklist
3. Meet with current "C" to discuss responsibilities, problems, hints etc.

Prior to Taking the Oath of Office:

1. Read the following publications:
 - a. "C" manual
 - b. Delta Chi Law
 - c. Chapter by-laws
 - d. Past semester chapter meeting reports
 - e. "No One Ever Told Me...!"
 - f. "You've Won The Election!"
 - g. "C"'s reference sheet
2. Review officer notebook with past "C"
3. Review the chapter risk management policies and the FIPG guidelines
4. Locate all old records and become familiar with filing system
5. Check supply of letterhead, envelopes, bid cards, etc.

"D"

Prior to the Election:

1. Attend at least one executive committee meeting
2. Attend at least one ABT meeting
3. Read the "D"'s responsibility checklist
4. Attend one finance committee meeting
5. Meet with current "D" to discuss responsibilities, problems, hints, etc.

Prior to Taking the Oath of Office:

1. Be confirmed by the ABT
2. Read the following publications:
 - a. Delta Chi Law
 - b. Chapter by-laws
 - c. *Financial Management BRIEF*

- d. *Alumni Board of Trustees* **BRIEF**
 - e. **Tax Guidelines**
 - f. **“No One Ever Told Me...!”**
 - g. **“You’ve Won The Election!”**
2. Review officer notebook with past “D”
 3. Review the chapter risk management policies and FIPG guidelines
 4. Meet with “BB”, ABT president, financial advisor, and accountant (if applicable)
 5. Look over the Headquarter’s supply order form, and talk with the “C”, rush chairman, and any other officers to see if anything is needed
 6. Ensure that the budget for the following semester is ready for chapter approval

“E”

Prior to the Election:

1. Read the “E”’s responsibility checklist
2. Attend at least one ABT meeting
3. Meet with current “E” to discuss responsibilities, problems, hints, etc.

Prior to Taking the Oath of Office:

1. Read the following publications:
 - a. *Alumni Board of Trustees* **BRIEF**
 - b. *Alumni Newsletter* **BRIEF**
 - c. *Alumni Relations* **BRIEF**
 - d. **“You’ve Won The Election!”**
2. Review officer notebook with past “E”
3. Review the chapter risk management policies and the FIPG guidelines
4. Meet with the “BB”, ABT president, and the alumnus editor of the chapter’s alumni newsletter

“F”

Prior to the Election:

1. Attend at least one executive committee meeting
2. Review the “F”’s responsibility checklist
3. Meet with current “F” to discuss responsibilities, problems, hints, etc.
4. Review the chapter risk management policies and the FIPG guidelines

Prior to Taking the Oath of Office:

1. Read the following publications:
 - a. *Risk Management Manual*
 - b. *Delta Chi Law*
 - c. *Chapter by-laws*
 - d. *Parliamentary procedure in Chapter Operations Manual or Cornerstone.*
 - e. **“You’ve Won the Election!”**
2. Review officer notebook with past “F”
3. Meet with the house corporation president, house manager, and the social chairman to discuss the “F”’s relationship as Risk Management Officer
4. Check condition of Ritual paraphernalia -replace or clean if necessary

ASSOCIATE MEMBER COUNSELOR

Prior to the Election:

1. Read the Associate Member Counselor’s checklist
2. Meet with current AMC to discuss responsibilities, problems, hints, etc.

3. If the AMC is a member of the executive committee, attend one meeting

Prior to Taking the Oath of Office:

1. Read the following publications:
 - a. *Big Brother* **BRIEF**
 - b. *Membership Education* **BRIEF**
 - c. *Pre-Initiation* **BRIEF**
 - d. “Good Brothers or Good Pledges?”
 - e. *Cornerstone*
2. Review officer notebook with past associate member counselor
3. Review chapter’s written membership education program with past AMC
4. Review the chapter risk management policies and the FIPG guidelines
5. Meet with the ABT’s Membership Education Advisor
6. Review Associate Member evaluations of the rush program

RUSH CHAIRMAN

Prior to Election:

1. Read the rush chairman’s responsibility checklist
2. Meet with current rush chairman to discuss responsibilities, problems, hints, etc.
3. If the rush chairman is a member of the executive committee, attend one meeting

Prior to Taking the Oath of Office:

1. Read the following publications:
 - a. *Recruitment* **BRIEF**
 - b. *How to Win Friends and Influence People* by Dale Carnegie
 - c. “Brotherhood Versus Alcohol”
2. Review officer notebook with past rush chairman.
3. Meet with the ABT Rush Advisor
4. Meet with the IFC rush chairman
5. Review Associate Member’s evaluations of past rush program
6. Review the chapter risk management policies and the FIPG guidelines

Officer Notebooks

In order to maintain a high level of stability in a chapter's programming, to make certain that the same mistakes are not made again and to see that great ideas are never lost, it is important for officers to continually develop their positions. When an officer transition occurs, a well organized and complete officer notebook will make a tremendous difference in the ability of the new officer to immediately understand and perform his responsibilities. With clearly defined programming, the new officer will have more time to spend in further developing and improving his position, instead of wasting time educating himself in what to do. Organized notebooks help facilitate a better officer transition and every officer and chairman should have one.

The Officer and Chairmen Notebooks ideally should all be similar 3-ring notebooks. This makes them conspicuous and, hopefully, less likely to be lost or accidentally thrown away. The contents of each notebook should be clear, concise and useful. There shouldn't be any out-of-date information (having a notebook with limited space as opposed to a box or filing cabinet should help minimize this problem).

Each notebook should contain:

1. Officer Responsibilities sheet. Located both in the *COM* and in the *Cornerstone*. Also mailed from IHQ twice each year.
2. The Basic Expectations of a Delta Chi
3. Reference Sheet; "BB", "A", "C", "D", "E"
4. Delta Chi Law
5. Chapter Bylaws
6. Pertinent **BRIEFs** (downloadable from www.deltachi.com). See Recommended Officer Notebooks form located in the front of the *COM*.
7. Articles where appropriate. Located in the *COM* and available from the Headquarters:
 - a. "What Does It Take To Have A Successful Chapter?"
 - b. "Good Brothers Or Good Pledges?"
 - c. "No One Ever Told Me...!"
8. Dividers for different sections
9. A section for After Activity Analysis forms
10. A section for short- and long-term goals of the office/chair
11. A section for helpful hints about running the position
12. A section for future ideas

Officer Transition Facilitation Questions

Gather all incoming and outgoing officers together and ask the outgoing officers to respond, one at a time to the following questions. This may be done either in a group or on a one on one basis; however, all answers should be relayed back to the group: These questions are provided as a starting point. The overall objective of the officer transition is to effectively pass on the reigns without losing any ground.

What are the responsibilities of the position beyond the day to day operations?

What goals did you have for the position going into your term of office?
Were those goals achieved? Why? How? Why not?

What would you do the same? Differently? Why

What do you feel was the most important part of your responsibility?
What do you feel was the most difficult part of your responsibility?

What things should be in the planning process now? Regional Conference, Convention, Jackson Leadership College, Founder's Day, Mom's Weekend, philanthropies, etc.

Are there any upcoming events that I need to be aware of?
What deadlines and significant dates are associated with your position?

Are there any key contacts that you dealt with? People that helped you accomplish your objectives that your successors may draw on?

Were there any things about the position that surprised you?

What can be expected?
Any last helpful hints, or words of advice?

Ask each of the new officers to spend 10 minutes reflecting on what objectives they have for themselves in the position; what goals they would like to see accomplished. (What would you try to do if you knew you could not fail? How would you make the chapter/colony better?)

The new Executive Board should now work to formulate some possible objectives for the coming semester. This can be done in a brainstorming format, with the facilitator capturing responses on a flipchart.

The "C" should then tabulate these responses and make copies to distribute to the chapter members prior to the Chapter Retreat. This will get members to begin thinking about the direction of the chapter before getting into the retreat setting .

Following the Chapter retreat, the new Executive Board should meet for their own retreat, to review what direction the chapter wishes to take, and to formulate an action plan to achieve those goals.

This action plan should be written down and redistributed to the members at the next chapter/colony meeting.